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CHAPTER 766: YEAR ONE - AN ANALYSIS

A Dissertation Presented

By

RONALD GEORGE CURRAN

Submitted to the Graduate School of the
University of Massachusetts in partial fulfillment
of the requirements for the degree of

DOCTOR OF EDUCATION

July 1976

School of Education

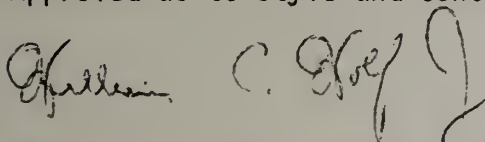
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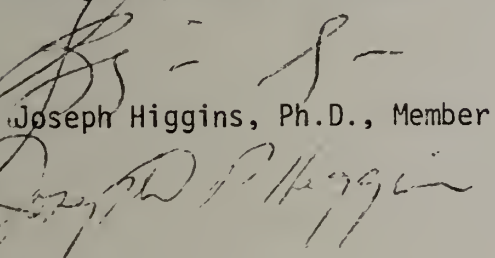
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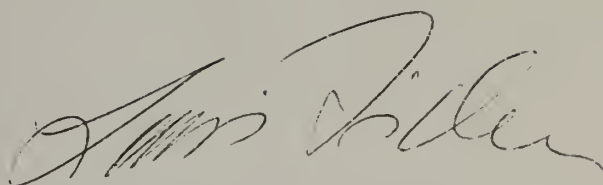


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RONALD GEORGE CURRAN

1976

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To the Committee, whose inspiration and encouragement provided direction and support to the researcher.

To William C. Wolf, Jr., Chairman, who worked tirelessly in guiding the research effort.

To the dedicated educators and administrators whose response to the philosophy of Chapter 766, and participation in the research conducted here, helped in making the contribution to research in education this effort represents.

DEDICATION

This work is dedicated, with love, to,

Ann,

Jennifer and Matthew

and in grateful memory, to,

MEMERE

ABSTRACT

Chapter 766: Year One - An Analysis

(July, 1976)

Ronald G. Curran, A.B., St. Anselm's College
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Directed by: Dr. William C. Wolf, Jr.

In 1972, the Commonwealth of Massachusetts' legislature passed an exciting and comprehensive law, Chapter 766, viewed as landmark special education reform. The law, implemented in 1974, removes all category labels pertaining to the handicapped and replaces these with the blanket designation, "special needs." The law additionally calls for a comprehensive evaluation process for "special needs" children and is committed to the philosophy of integration of handicapped within the mainstream of education to the fullest extent possible. Additionally, the law mandated parental participation in determining the educational future of their child. All of these features represent a departure in the traditional special education practice in Massachusetts.

Beyond the dramatic and long overdue changes mandated by Chapter 766 with regard to special education, the law has, inherent in its implementation and philosophy, implications for the traditional or regular education program as well. The law presents a new conceptualization regarding variance in learner styles, in that wider ranges and varieties of learning abilities will now be represented in regular classrooms.

The process of the implementation of Chapter 766 during the initial year of its mandate, the school year 1974-75, is the subject of this research effort. The research was conducted in an "ex post facto" style, that is, after the initial year of implementation, and the purpose was to examine the implementation efforts of a group of school districts in an effort to determine what factors influenced the ability of the school districts to implement the law.

A series of hypotheses were authored and data collected to evaluate the variables in question, with the hypotheses written in the "null" format and subjected to a chi-square analysis to ascertain the significance of the relationships prescribed. The variables researched include: total school district enrollment, percentage of "special needs" enrollment, per-pupil expenditure on "special needs" pupils, the degree of change required to implement Chapter 766, the school districts' prior involvement with educational change, the leadership patterns, the methods of implementation, the acquisition of needs assessment information, and the use of early adopters in subsequent implementation efforts.

Two data sources were used, the State Department of Education Monitoring Reports and a survey instrument developed to isolate a variety of variables with regard to the implementation of Chapter 766 in each school district.

From the data analysis, the following generalizations resulted: (1) Most school districts reported change leadership as a function of administration, (2) Expenditures on the targets of change efforts appear not to affect the implementation of that change, (3) Innovative and/or research based change implementation strategies are not generally practiced

by the school districts, (4) Needs assessment information is generally not collected in a well defined systematic manner in most school districts in the sample.

With legislation such as Chapter 766, education in Massachusetts is moving toward greater individualization and recognition of the needs of individual learners. The study conducted here uses Chapter 766 as an example of educational change, and attempted to assess the influence of a series of variables on the implementation efforts. This study is an initial investigation into educational change implementation and hopefully will provide direction for future educational research.

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CHAPTER I

INTRODUCTION

Educational change has been the subject of much research and learned speculation in recent years, and the topic has become synonymous with educational progress in many circles. Despite the preponderance of speculation and interest in educational change there remains a general confusion in the literature as to the dynamics of the change process. A variety of theories can be found among the writings of educators, researchers, and sociologists regarding change in an educational environment. Sarason (1971)¹ has popularized the notion that the more things change, the more they stay the same, and this paradox can serve to illustrate the complications and problems the researcher has in dealing with educational change.

The concept of change itself entails both complex system wide reorganization and the simplest substitution of one material for another in a given classroom. Educational change, then, may be a simple effort or an exceptionally complex, cumbersome enterprise. Whatever, attempts to alter educational practice often produce effects and consequences which are unanticipated. For this reason, change undertakings often fall short of hoped for effects.

Education is a complex and dynamic system, which functions as one institution within a greater social system. Education is subject to many social conditions and ideals which define its existence. The

¹Seymour B. Sarason, The Culture of the School and the Problem of Change, Allyn and Bacon, Inc., Boston, 1971.

interplay of all these factors presents a significant challenge in attempting to develop either a theory of educational change or a set of rules to influence change practice. Chin characterized the status of current research in educational change in the following way:

We are in a primitive stage in creating a body of knowledge for effecting change that is relevant to the existing conditions and problems, that includes the processes for arriving at mutually constructed goals, that has spelled out procedures, and that advances the problem toward these directions.²

In 1973, Giacquinta, writing in Fred N. Kerlinger's Review of Research in Education, discusses the need for future research into the change process in education. Giacquinta writes:

This review has underscored the complexity of the process of organizational change in schools, our present minimal understanding of its dynamics, and an inadequacy of related theory and research. Future research will require separating aspects of this complex process conceptually, developing appropriate instruments for measurement, and designing and doing research that will provide for more sophisticated statistical analysis. It is to be hoped that the simplistic explanations of the change process often found in the literature will be replaced by adequate theory to explain change and rigorous research to test the implications of the theory.³

Bennis, Benne and Chin also speak of the need for research in the area of transmitting change theory into practice. In the introduction of their work, The Planning of Change, the editors state, "The relation-

²Robert Chin, "Basic Strategies and Procedures in Effecting Change," Planning and Effecting Needed Changes In Education, Edgar L. Morphet and Charles O. Ryan, eds., Designing Education for the Future, Denver, Colorado, 1967, p. 56.

³Joseph B. Giacquinta, "The Process of Organizational Change in Schools," Review of Research in Education, Fred N. Kerlinger, Ed., F. E. Peacock Publishers, Inc., Itasca, Illinois, 1973, p. 204.

ship between theory and practice must constantly be kept within the same field of vision in order for both to cope with the extingencies of reality. We have developed a substantial body of theory and certainly a rich body of practice, but somehow our failure has been to provide the transformations and bridging between the two."⁴ In order to accomplish this bridging of theory and practice, it would appear that the development of research analyzing specific change practices in relation to educational change theory can begin to close the gap. The research presented here is an attempt at that goal.

As stated earlier, the concept of educational change is broad and complex. Most educational change theories have postulated that change occurs in stages. Rural sociologist, Everett Rogers' model for "collective adoption of an innovation" has gained considerable attention from educators interested in the change process. Rogers' model and the description of the four stages therein provide us with a presentation of the change process as a series of elements:

1. Stimulation or awareness by someone that a need for a certain innovation exists.
2. Initiation or promotion of the introduction of the new idea in the social system.
3. Legitimation or decision to adopt or reject the innovation by those in power.

⁴Warren G. Bennis, Kenneth D. Beene, Robert Chin, The Planning of Change, Holt, Rinehart and Winston, Second Edition, New York, 1969, p. 4.

4. Execution or putting the decision into action.⁵

In 1971, Rogers describes the process of change as characterized by three stages. He writes, "We suggest three sequential stages in the process of social change: (1) invention, the process by which new ideas are created or developed, (2) diffusion, the process by which these new ideas are communicated to the members of a given social system, and (3) consequences, the changes that occur within the social system as a result of the adoption or rejection of the innovation."⁶

Clark and Guba, writing in the mid 1960's proposed the Research, Development, Dissemination and Adoption Model (RDDA)⁷ of change. In 1974, Clark and Guba criticized their model as reported in the following:

The RDDA Model has been criticized recently by Clark and Guba (1974) who, ironically, were responsible for its emergence and popularity. They now argue that the institutions responsible for educational innovation are not necessarily related to each other in an orderly, logical system as posited by the RDDA Model, but rather relate as complex configurations of overlapping and occasionally

⁵Everett Rogers, (1968), reported in The Development of Educational Programs: Advocacy in a Non-Rational System, Ernest R. House, et. al., Illinois University, Center for Instructional Research and Curriculum Evaluation, November, 1970, pp. 2-3.

⁶Everett Rogers, Floyd Shoemaker, Communication of Innovations, Second Edition, The Free Press, Division of MacMillan Publishing Company, Inc., New York, 1971, p. 38.

⁷David L. Clark and Egon G. Guba, "An Examination of Potential Change Roles in Education," National Education Association, Washington, D. C., October, 1965, p. 7.

competing functions.⁸

Clark and Guba currently propose that the Configuration Model of educational innovation/diffusion/adoption process replace the RDDA Model. The Configuration Model is described as follows:

The Configuration Model describes educational knowledge production and utilization institutions as relating to each other in a "community" sense rather than an organizational sense. According to the model, these institutions consist of a highly decentralized community, with complex relationships and institutional characteristics. The model implies that policy regarding education innovation should realistically reflect this complexity by encouraging the adoption of a greater diversity of approaches to innovation than is currently considered appropriate under the systems view of educational knowledge production and utilization.⁹

The research conducted in this effort attempts to build on the change theory cited, which regards educational change as a series of stages within a complex environment. By attempting to isolate a particular stage of the change process, the effort will aim to begin to bridge the theory with the practical.

The study focuses upon the implementation aspect of a recently initiated state-wide change process. The researcher has conducted a study of the initial attempts to implement Chapter 766 of the Public Laws of the Commonwealth of Massachusetts, 1972. Research reported highlights the first year of the implementation of Chapter 766, the school year, 1974-1975.

⁸D. C. Hall and S. E. Alford, Evaluation of the National Diffusion Network: Evolution of the Network and Overview of the Research Literature on Diffusion of Educational Innovations, Menlo Park, California: Stanford Research Institute, January, 1976, p. 21, HEW Contract 3007 50260.

⁹Ibid., D. C. Hall and S. E. Alford, p. 21, 1976.

An ex post facto study, as described by Donald Ary, Lucy Cheser Jacobs and Asghar Razavich, in their book, Introduction to Research in Education, is utilized in this research effort. The authors define an ex post facto approach as follows. "In other words, it is research in which the consequence is immediately observable, and the problem is to determine the antecedents that gave rise to this consequence. The basic purpose of ex post facto research is to discover or establish causal or functional relationships among variables."¹⁰ Kerlinger defines ex post facto research in a similar manner when he states, "That research in which the researcher starts with the observation of a dependent variable or variables. He then studies the independent variables in retrospect for their possible relations to, and effects on, the dependent variable or variables."¹¹

In conducting the research in this study, a census taking methodology was employed to collect the data. In the collection of the information certain objectives guide the process.

Specific Objectives

The research in this study specifically examines the implementation of Chapter 766 during the first year of its legislative mandate. The intended purpose of the study is to document the degree to which a selected sample of school districts, those which comprise the Springfield

¹⁰Donald Ary, Lucy Cheser Jacobs, Asghar Razavich, Introduction to Research in Education, Holt, Rinehart and Winston, Inc., New York, 1972, p. 264.

¹¹Fred N. Kerlinger, Foundations of Behavioral Research, Holt Rinehart, and Winston, New York, 1966, p. 360.

Education Region, have implemented Chapter 766. Further, the study aims to identify factors which have contributed to the success or failure of Chapter 766 implementation endeavors.

The working hypothesis of this research is that certain common elements or characteristics will surface among the districts which represent those that have achieved a high degree of implementation and that the same will be true of those less fully implemented. From the data uncovered in the study, it is expected that certain generalizations can be made regarding the change process within the educational environment being studied, at least with regard to the type of change Chapter 766 represents. Information sought provides a basis for further research and gives those interested in instituting educational change a framework for their consideration in planning subsequent change efforts.

The research is designed to measure participating districts' implementation efforts in each of the following dimensions:

1. The prior status of special education programs within the school district;
2. The extent of prior involvement in innovation or change activity of each of the school districts;
3. The sources of leadership in the change effort, the position and status of key personnel;
4. The amount of effort invested to identify and utilize optimum methods for diffusing Chapter 766 and the innovation and change the law represents;
5. The acquisition of needs assessment information

by the school districts;

6. The influence of early adopters on laggards, and the degree to which the school districts capitalized on the influence potential of those early adopters.

Two data sources, the Monitoring Reports of the Bureau of Special Education, and a survey developed for the purposes of this research form the basis of the study undertaken. Analysis of the data attempts to isolate those characteristics which have had an impact on each school district's ability to successfully implement Chapter 766, and provide insight into the educational change process.

Sources of Data

For purposes of this study, the researcher focuses on the twenty-four (24) school districts which comprise the Springfield Education Region of the State Department of Education. The school districts in this region are served by the same Bureau of Special Education staff, and Regional Advisory Council, and therefore, they are being monitored and evaluated using common criteria. The region also presents a geographic diversity from urban to rural and a wide variety of socio-economic characteristics.

Initially, evaluations of each school district, as monitored and reported by the Bureau of Special Education Intervention of the Springfield Region Office of the State Department of Education were examined. This office staff has developed a monitoring and evaluation format, and has conducted indepth surveys of each of the school districts in the region. Data culled from these monitoring forms includes: school population statistics, Chapter 766 referral and CORE

Evaluation statistics, and special education budgetary information. Information from these statistical reports has been analyzed to determine indicators of the degree of implementation achieved during the 1974-75 school year as well as factors which may have had a bearing on that achievement.

A survey instrument has been developed and administered in each district to gain further insight into the implementation process manifested by each district regarding Chapter 766. Through use of these two sources of information, it is believed a comprehensive view of the change process regarding implementation can be offered.

Research Limitations

In choosing the State Department of Education's Bureau of Special Education monitoring data, an attempt has been made to authenticate the statistics reported. The State Department has the legal authority and right to access to the information contained in their reports. The information was collected by State Department educational specialists through on-site visitations in each school district. The substance of the information on the monitoring reports is basic statistical information which is objectively reported on the monitoring forms.

The survey, developed by the researcher, has been directly administered to those individuals responsible for the implementation of the change dimension, Chapter 766, in each school district, namely, the Special Education Administrators. The responses of these administrators reflects those aspects of educational change as viewed by them in their position in the school system. In this research, the degree of imple-

mentation, and the methods employed to achieve that status are the objective measures to be evaluated. No attempt will be made to assess the subjective impact of the educational change on students, teachers, or others in the educational environment. Hence, responses may reflect subjects' desires to be effective more than the reality of their effectiveness as implementers.

Another related limitation, and an important one, is that in measuring the degree of implementation of Chapter 766, an assessment of the quality of that implementation is not possible given the nature of the statistical data collected. The quality of the implementation of Chapter 766 in each of the school districts can only adequately be measured through subjective evaluation and longitudinal studies of the effects of the special services on the target population, the special needs pupils.

By using information available from the State Department of Education's Bureau of Special Education, an indication of the degree of implementation of each school district can be drawn from those charged by state law to monitor and evaluate the school districts' compliance with Chapter 766. Usage of these data highlights a final limitation of this study.

The Regional Office Staff of each educational region in Massachusetts was assigned to direct, supervise and facilitate the implementation of Chapter 766 in their regions. Therefore, the research in this study is limited to the Springfield Education Region. This limitation assures that the districts studied have had uniform direction and assistance from the state in their implementation efforts. The

conclusions that are drawn from the data analysis only applies to the districts in the sample region, and generalizations may or may not apply to other school districts. The region which serves as the sample, however, does represent a cross section of population characteristics, and socioeconomic variables.

Definition of Terms

Adoption. A decision and action to make full use of a new idea as the best course.

Diffusion. The process by which new ideas are communicated to the members of a social system.

Ex post facto research. Research in which the consequence is immediately observable, and the problem is to determine the antecedents that gave rise to this consequence.

Innovation. An idea, practice, or object perceived as new by an individual or group.

Laggards. The last to adopt an innovation.

Regular school program. A building and program under the supervision of a school committee in which more than 70% of the children educated therein are children without special needs.

School age child with special needs. A school age child who has been determined by referral and evaluation to be unable to progress effectively in a regular education program and requires special education.

Special education. Everything which is required to be provided to a school age child with special needs pursuant to the educational plan for such child.

Traditional education program. Same as above, "regular school program."

Significance of the Research

Research presented in this study has significance from two dimensions. Initially, there is an attempt to provide a measure of the degree of implementation of Chapter 766 achieved in the Springfield Education Region during the first year of the legal mandate. Insight into the problems or hindrance factors in the implementation process, which will have to be dealt with as the law continues to be implemented, will be gained in this effort.

Secondly, the study attempts to provide data and information regarding those characteristics of school districts, and the change efforts each district employs, which have an impact on the adoption of educational change. Information has been gathered regarding those specific conditions relating to the implementation of Chapter 766, but additionally, generalizations can be drawn that can influence other attempts at educational change.

In each of these dimensions, direct influence on educational practice can result. Information can be of value to personnel responsible for the implementation of Chapter 766 in Massachusetts, and additionally, the information may be of value to personnel in other states where similar legislation is pending or under consideration.

The data analysis conducted in this research provides information regarding those characteristics of school systems which have a bearing on the ability of the school system to adopt educational change. This information will be of use to those concerned with the facilitation of educational change and innovation, and provide indications of where further research and study is needed.

C H A P T E R I I

CHAPTER 766: A MANDATE FOR
EDUCATIONAL CHANGEIntroduction

The subject of this research on educational change is Public Law, Chapter 766, the State of Massachusetts, 1972. The purpose of this chapter will be to examine Chapter 766, and isolate its educational change components. Chapter 766 represents significant special education change and reform, however, through the examination of the legislation in detail, implications for educational change in the total school environment emerge.

In order to gain an understanding of Chapter 766 and its status as "educational change," research is presented in this chapter in the following manner: (1) The historical perspective and conceptual framework of Chapter 766; (2) An examination of the Regulations promulgated to direct the implementation of Chapter 766; and (3) An examination of the Concept Paper of the CORE Evaluation Manual, published by the State Department of Education to regulate the evaluation process of "special needs" pupils.

The Legislation - Chapter 766

On July 17, 1972, landmark legislation in the area of special education was signed into law in the State of Massachusetts. The Daly-Bartley Act, Chapter 766, calls for wide-sweeping philosophical and practical change in educational practice regarding the handicapped. Initially, the law seeks to eliminate labels (i.e., mentally retarded, emotionally disturbed, physically handicapped, learning disabled, etc.)

and replace the former categories with a blanket definition, "school age child with special needs."¹² This conceptualization places emphasis on the determination of learner needs rather than on categorical diagnosis. Burton Blatt speaks of the consequences of the category label system when he writes, "the result of this process was an array of disability categories, each with its unique structure of pupil eligibility and support and each effectively excluding all children who did not meet program entrance criteria, thus guaranteeing that some children would not meet criteria for admission to any program."¹³ Specific problems relating to the category system in education are described by Reynolds and Balow in the following:

A number of problems may be created by the categorizing of people and programs. (a) There is a tendency to stereotype or to ascribe characteristics of the groups to individuals. The practice, crude at best, is frequently in error and prejudicial to the interests of the individuals. (b) The category labels tend to become stigmatic and to be attached indelibly to the individuals, often resulting in scapegoating. Sometimes the child's label becomes an excuse for poor educational programs. (c) People who work with exceptional children may associate the categories with negative expectations and then carry them into their relationships with the children and into curriculum planning. A degree of diagnosogenic or prophecy fulfilling inadequacy in the child's development may result. (d) An assumption is made frequently about an easy isomorphism between categorical and educational classifications. For example, it may be assumed that all partially sighted children should read expanded print - which is just not so - or that because a child is "mentally retarded" he should get the "primary life needs" curriculum - again, not

¹²Regulations for the Implementation of Chapter 766 of the Acts of 1972; The Comprehensive Special Education Law, Commonwealth of Massachusetts. (May, 1974), p. 2.

¹³Burton Blatt, "Public Policy and the Education of Children With Special Needs," Exceptional Children, March, 1972, p. 538.

necessarily so.¹⁴

An even more tragic result of the category - label system in special education is the denial of educational opportunity, of any type, to certain youngsters. The incidence of this situation is cited in the 1971 Report of the President's Committee on Mental Retardation. The committee writes, "A Bureau of the Census special report states that in 1969 approximately 450,000 non-institutionalized children, aged six to fifteen, were not enrolled in school. Many of these were excluded because they are mentally retarded, although the total also includes children who are crippled, emotionally disturbed or non-English speaking."¹⁵

Chapter 766 charges the public school systems with the responsibility of providing education for all special needs persons, ages 3-21, who reside in their school district. This places the local school system in the position of being directly responsible for the screening, identification and service delivery program of those with special needs. The goal is to encourage the participation of special needs children in regular education programs, community based, to the fullest extent possible. The integration of special needs youngsters into regular classrooms, the development of support systems to augment the traditional educational programs, and the expansion of wider, specialized educational

¹⁴Maynard C. Reynolds and Bruce Balow, "Categories and Variables in Special Education," Exceptional Children, 38 (1972), pp. 357-366.

¹⁵The President's Committee on Mental Retardation, MR 71 Entering the Era of Human Ecology, Department of Health, Education and Welfare, Publication No. (OS) 72-7, p. 16.

opportunities within the local school districts, are all aims of this legislation.

The segregation of children with special needs from the "normal" school environment has been a widespread practice, based on the sincere belief that such specialized programming was beneficial to both the special child and to the regular school population. Increasingly, this philosophy came under scrutiny, and in fact, the motivation for this practice came into question. In 1968, Dunn wrote:

Regular teachers and administrators have sincerely felt they were doing these pupils a favor by removing them from the pressures of an unrealistic and inappropriate program of studies. Special educators have also fully believed that the children involved would make greater progress in special schools and classes. However, the overwhelming evidence is that our present and past practices have their major justification in removing pressures on regular teachers and pupils, at the expense of the socioculturally deprived slow learning pupils themselves.¹⁶

Chapter 766 seeks to define the philosophy of special education practice in Massachusetts. The law requires substantial documentation and justification by a school system which seeks to segregate youngsters educationally. In fact, the law requires that all efforts on behalf of special needs children should be aimed toward the inclusion of such youngsters in the regular school program. The local school systems have a variety of educational options available to them in their attempts to provide equalized educational opportunity for all children. Optimally, the law suggests that each district develop its own programs; however, the systems may choose to purchase services through local, outside

¹⁶Lloyd M. Dunn, "Special Education For the Mildly Retarded - Is Much of It Justifiable?," Exceptional Children, September, 1968, p. 6.

agencies, contractually collaborate with other school districts, or cooperate in placement arrangements with other state agencies such as the Departments of Mental Health, Public Health and Welfare. However, the responsibility of educational plan development for each child is squarely in the hands of the local district. It is in this regard that the law takes on another new and dramatic dimension.

Placement of youngsters in specialized programs in the past in Massachusetts and in many other states, was based on various diagnostic predictions. An IQ test score could "certify" retardation and qualify a child for years of special class training. Behavioral difficulties could culminate in placement in "pupil adjustment" or emotionally disturbed classes, or even expulsion from public school. Physical constraints such as lack of mobility, deafness, epilepsy, and difficulty with toilet training could withdraw the availability of public education to youngsters. To use these criteria in determining educational strategy is as suspect as the use of labels mentioned earlier. Regarding the use of intelligence tests in determining educational program, Jones and Macmillan write, "Intelligence tests serve primarily to classify individuals as mentally retarded, gifted, or average but have been of little help to teachers in pinpointing strengths and weaknesses in a child's performance."¹⁷ Dr. Jane Mercer of the University of California has published research results in the area of mental retardation gathered in an eight year study of special education in Riverside, California. Regarding the area of diagnostic testing, Dr. Mercer writes:

¹⁷R. L. Jones and Donald L. Macmillan, Special Education in Transition, Boston, Allyn and Bacon, Inc., 1974, p. 127.

It became clear very early in our study that the crux of the problem was in the clinical perspective itself and in the kinds of instruments used to evaluate children. With this in mind, we looked to other predictive variables..... We found that Anglos with I.Q.'s of below 69, in general were also failing in adaptive behavior in their social roles. But this was not true of persons from Mexican-American or Negro backgrounds.

We also found that we could predict twenty-five percent of the variance in I.Q. simply by knowing the cultural setting from which the person came.¹⁸

Chapter 766, accounting for the need for a comprehensive approach to the determination of "special need", mandates that each person suspected of having a special need undergo a CORE evaluation consisting of the following elements:

- 320.1 Assessment of the child's educational status.
- 320.2 Assessment by certified teacher.
- 320.3 A comprehensive health assessment by a physician.
- 320.4 An assessment by a psychologist.
- 320.5 An assessment by a nurse, social worker, or guidance counselor or pertinent family history and home situation factors.
- 320.6 Any additional assessments by specialists (as deemed necessary by the CORE team).¹⁹

The CORE evaluation process, as outlined in the CORE Evaluation Manual²⁰ is aimed at the development of an educational plan. Such a

¹⁸Jane Mercer, "An Address Presented at the Conference on Placement of Children in Special Education - Programs for the Mentally Retarded," A Very Special Child, Bureau of Education for the Handicapped, The Council for Exceptional Children, March 10, 1971, p. 8.

¹⁹Regulations for the Implementation of Chapter 766 of the Acts of 1972: The Comprehensive Special Education Law, Commonwealth of Massachusetts. (May, 1974), pp. 21-22.

²⁰CORE Evaluation Manual, Commonwealth of Massachusetts, Department of Education, Division of Special Education, First Edition, 1974.

comprehensive assessment replaces the previous unequal and often inadequate methods of diagnosing learning or social development variances. The focus after the assessment is on the development of educational strategies that are based on the assessed capabilities and appropriate educational goals for each individual. The product of the CORE evaluation, the educational plan, is an educational prescription, which in the combined judgement of the CORE team members, will meet the needs of the subject of the evaluation.

The inclusion of the child's parents or guardian, as participating CORE team members, marks another departure from established practice. In fact, the mandate for parental involvement in all phases of educational planning under Chapter 766, strongly reflects a shift in philosophy regarding the involvement of parents in educational planning for their child. In the past, parents were minimally involved, as Ross, et. al., state:

Parents are not given an adequate opportunity to participate in the placement decision. Most school codes require that the parents be notified when the decision to place a child is reached, and some codes require that a hearing be held before placement. However, parents often are not notified when their children are placed in a special class and are almost never given a formal opportunity to be heard before the placement decision is reached.²¹

Chapter 766, when placed under careful analysis, is essentially a "child centered" legislative act. Though bureaucratic in procedural implementation, the focus of the law is on matching the educational program to those particular needs of the child. Just how special edu-

²¹Sterling L. Ross, Jr., et. al., "Confrontation: Special Education Placement and the Law," Exceptional Children, 38 (1971), pp. 5-12.

cational reform of this nature came about provides an interesting commentary on the legislative process.

In the late 1960's and early 1970's, a ferment of concern developed about society's handling of handicapped individuals. Weintraub and Abeson discuss this social awakening and mounting concern:

A quiet revolution has been fought within American education during the past few years. Its goal is the right to an education for ALL American children, and particularly those usually known as "the handicapped," those who because of mental, physical, emotional, or learning problems, require special education.

This revolution to establish for the handicapped the same right to an education that already exists for the non-handicapped has been occurring through the nation, in state and local school board rooms, state legislative chambers and perhaps most importantly, in the nation's courts.²²

Several states found themselves, or their local boards of education, being sued by advocacy groups for failure to provide equal educational opportunity to all school age children. Some of the most widely cited court actions in this area are as follows:

Diana v. State Board of Education,²³ filed in District Court for the Northern District of California, February, 1970. The suit was in behalf of nine Mexican-American public school students who charged that they had been placed in classes for the mentally retarded on the basis of scores achieved on I.Q. tests (Stanford-Binet and Wechsler), that were primarily tests of verbal aptitude based on the English language,

²²Frederick J. Weintraub and Alan Abeson "New Education Policies for the Handicapped: The Quiet Revolution" Phi Delta Kappan, April, 1974, p. 526.

²³Diana v. State Board of Education, C-70, 37-RFP, District Court for Northern California, February, 1970.

and that these same tests were standardized on native born, white Americans. The court ruled in favor of the plaintiffs.

Arreola v. Board of Education,²⁴ Superior Court of Orange County, California. In this case the court ruled that placement in a special class for the retarded must be preceded by due process as required by the 14th Amendment to the United States Constitution, and Article I, Section 13 of the California Constitution. Additionally, the court ruled that I.Q. tests used in evaluating children for placement in special education classes, must be free of culture bias and further, that special education programs must be educationally meaningful with provisions made for periodic re-evaluation of special class pupils.

Steward v. Phillips,²⁵ filed in Massachusetts Federal District Court in October, 1970, charged that the poor or black pupils in the special education classes in the city of Boston public schools had been denied appropriate educational programs, and that these youngsters had been placed in special education classes on the basis of I.Q. tests that are culturally biased.

Pennsylvania Association for Retarded Children, Nancy Beth Bowman, et. al., v. Commonwealth of Pennsylvania, David H. Kurtzman, et. al.,²⁶ filed in the Third United States District Court of Pennsylvania is considered by many special educators as a milestone in special educational

²⁴Arreola v. Board of Education, 160577, 1968.

²⁵Stewart V. Phillips, 70-1119-F, October, 1970.

²⁶Pennsylvania Association for Retarded Children, Nancy Beth Bowman, et. al., v. Commonwealth of Pennsylvania, David H. Kurtzman, et. al., 334 F. Supp. 1257 (3-Judge Court, E.D. Pennsylvania, 1971).

reform. Closer Look, the Journal of the National Special Education Information Center, Department of Health, Education and Welfare, writes, "The decision of the court in Pennsylvania was a turning point. It made clear that patterns of exclusion which had closed doors to many thousands up until that day were no longer acceptable. Not only were retarded children entitled to an education, the court affirmed, but to deny them that right was to deny them their Constitutional guarantee of equal protection of the law. And when the decision of the court was reached, it was based on a new definition of education which said not that each child was entitled to the same education, but that each had a right to the kind of education that would help him reach his own potential."²⁷

The Pennsylvania decision provided the impetus that special education reform groups in Massachusetts needed to stimulate the legislature to proceed toward the type of legislation Chapter 766 represents. The Massachusetts Association for Retarded Children (MARC) promptly notified the legislature of their intention to promulgate litigation in Massachusetts similar to that of the Pennsylvania Association. At this point, the legislature responded by setting up a committee to study the need for legislative reform in special education.

Once the initial thrust had been made, Representatives Michael Daly (D-Boston) and David Bartley (D-Holyoke), spearheaded the legislative efforts in developing a bill for special education reform. They involved

²⁷Closer Look, National Special Education Information Center, U. S. Department of Health, Education and Welfare, Office of Education, Bureau of Education For the Handicapped, Spring, 1974, p. 1.

various consumer groups in drafting the bill, among them were: Massachusetts Association for Retarded Children, Massachusetts Association for Paraplegics, Massachusetts Children's Lobby, Massachusetts Congress of Parents and Teachers, Massachusetts Council for Organizations for the Handicapped, Massachusetts Parents Association for the Deaf, Massachusetts Teachers' Association, Muscular Dystrophy Associations of America - Greater Boston Chapter, National Association for Brain-Injured Children, National Society for Autistic Children, Task Force for Children Out of School, Task Force for the Handicapped, and the United Cerebral Palsy Association for the Greater Boston Area.

Several drafts and compromise proposals were developed until, spurred on by massive lobbying efforts and private sector pressure, the legislative committee drafted House Bill 283, the forerunner of Chapter 766. Representative Michael Daly, speaking to the legislature in support of the proposed special education reform bill, H. 283, summed up the state of special education legislation in Massachusetts at that time:

Our laws stigmatize children and encourage school committees to send them away from their home towns rather than provide educational programs and services there.

Our laws are discriminating: Program opportunities which they mandate or encourage, discriminate on the basis of categories - labels that are properly the responsibility of the professionals and do not belong in the laws, if indeed, they belong anywhere.

The effect of our special education laws is to create a situation so chaotic that thousands of children have no educational opportunity at all, much less equal opportunity.²⁸

²⁸Michael Daly (D-Boston) "Statement before the Joint Committee on Education in Support of H. 283 (Daly-Bartley)," February 29, 1972.

House Bill 283 was countered by a proposal of similar philosophy but with changes made in the area of reimbursement to cities and towns, offered by Governor Francis Sargent. After further consultation, the two proposals were meshed and the result was Chapter 766 which passed both houses of the state legislature and was signed into law by Governor Francis Sargent on July 17, 1972. Due to the massive and sweeping changes mandated under Chapter 766, the local school systems were given until September 1, 1974 to gear themselves for implementation.

The law itself was the first step in the process toward special educational reform. The scope of the law is comprehensive. However, it alone does not provide the structure and procedure to guide the local districts in implementation. Thus, the Department of Education began a long process of developing regulations for implementation. The regulations were drafted and redrafted several times, presented in draft form to interest groups across the state. Through consultation, discussion and input from the various public and private interest groups, the final draft of the regulations was published in May, 1974. It is within these regulations that we will now examine some specific implications for education.

The Regulations

After an elaborate process of drafting sample regulations, presenting these to various interest groups across the state, and re-drafting new regulations to incorporate recommendations, the final set of "Regulations for the Implementation of Chapter 766 of the Acts of 1972: The Comprehensive Special Education Law," were published on May 28, 1974. It is this document, of 107 pages, which will direct

school systems' efforts toward full implementation of Chapter 766. The contents of the Regulations allow an easy comprehension of the scope of the procedural mandate:

Chapter 1	Definitions
Chapter 2	General Provisions
Chapter 3	Identification, Referral and Evaluation
Chapter 4	Appeal Procedure
Chapter 5	Programs
Chapter 6	Services for Children of Ages Three and Four
Chapter 7	Education of Children in Institutions Under the Control of the Departments of Mental Health, Public Health and Youth Services
Chapter 8	Private Schools
Chapter 9	Transportation
Chapter 10	Special Education Professional Standards
Chapter 11	Regional Advisory Councils; the State Advisory Council; Regional Review Boards; the State Review Board. ²⁹

The Regulations document is preceded by a short explanatory discourse on the "Purpose of Chapter 766." From that paper, the following excerpt synthesizes the goals of the legislation:

In the light of the policy of the Commonwealth to provide an adequate, publicly supported education to every child resident therein, it is the purpose of this act to provide for a flexible and uniform system of special education program opportunities for all children requiring special education; to provide a flexible and nondiscriminatory system for identifying and evaluating the individual needs of children requiring special education; requiring

²⁹Regulations for the Implementation of Chapter 766, Commonwealth of Massachusetts, Department of Education, May 28, 1974, Summary of Contents, p. IV.

evaluation of the needs of the child and the adequacy of the special education program before placement and periodic evaluation of the benefit of the program to the child and the nature of the child's needs thereafter; and to prevent denials of equal educational opportunity on the basis of national origin, sex, economic status, race, religion, and physical or mental handicap in the provision of differential education services.³⁰

The regulations are set up on a chapter basis with each chapter representing particular content areas.³¹ Each chapter is assigned a numerical base (i.e., Chapter 1 = 100, Chapter 2 = 200, Chapter 3 = 300, etc.) and the various subheadings in each chapter are numbered progressively. For example, the first citation from the regulations mentioned below is 209.0. From that number we can determine that that citation is the ninth subheading in Chapter 2.

The following documentation of selected line item references are taken specifically from the regulations. The particular items were selected to demonstrate where regular education programming and function is effected by special education legislation.

209.0 Testing: Limitations on the use of tests.

Each school committee shall insure that wherever testing of a school age child is required or permitted by these regulations, the results of standardized local tests of ability, aptitude, affect, achievement or aspiration or of projective personality tests shall not be used exclusively or principally as the basis for any finding or conclusion. Such tests shall not be used at all unless approved, both

³⁰Ibid., p. II.

³¹See Appendix, Table of Contents.

as to content and method of administration, by the Division to insure that they are as free as possible from cultural and linguistic bias or, wherever necessary, separately evaluated with reference to the linguistic and cultural groups to which the school age child belongs. Such tests shall be administered and interpreted only by persons specifically qualified to administer and interpret them.

This item reflects the court findings of cultural bias in assessment as discussed earlier and also prohibits the placement of a youngster in specialized programs solely on the basis of test data. By implication, this regulation recognized the cultural and linguistic variation of the school population and the effect that these variations have on learning performance. If, in fact, test data must be evaluated with regard to cultural and linguistic variation, it would appear logical that the educational systems and programs must also evaluate the relationship of cultural and linguistic variations to the performance of children in the traditional setting in order that equal educational opportunity be available for all.

306.0 Identification: Kindergarten entry screening.

Each school committee shall conduct a screening program for all children who are of age to enter kindergarten in September of each year. Such screening program shall be completed no later than April 1 of each calendar year. Such screening may be conducted in conjunction with the screening of children ages three and four. Such screening program shall be an annual survey conducted pursuant to the provisions of this paragraph and paragraphs 305.0 and 307.0, and shall be fully described in

the plan required by paragraph 303.0. Except for the comprehensive health assessment required by paragraph 306.2, which is intensive in nature, such screening program shall be designed and conducted in such a manner as to provide a nonintensive scan of all children of kindergarten age who should be referred for an evaluation.

The purpose of 306.0 is to identify possible incidence of special need among the pre-kindergarten population. Certainly this regulation reflects the philosophy that early intervention in learning or developmental lag will facilitate the maximization of potential. The elements of the kindergarten entry screening, which are developed in subsequent sections of paragraph 306.0 (306.1, 306.2, 306.3, 306.4, 306.5, 306.6 and 306.7) consist of a health assessment, vision assessment, hearing assessment, visual, auditory and motor function, and a language assessment. These assessments provide to the educators new data sources for program development and curriculum change, and allow for the prospective kindergarten teacher an opportunity to modify, expand and adapt the learning environment to more accurately reflect the needs of all new kindergarten pupils.

311.0 Evaluation: CET's; composition for writing education plan.

For each individual full core evaluation, the persons listed below shall meet to write the educational plan of the school age child who has been evaluated.

311.5 A certified or approved teacher who has recently had or currently has the child in a classroom or other teaching situation.

The regular classroom teacher, who may have been the source of

referral, is mandated in regulation 311.5 to participate in the development of the educational plan. In essence this establishes the value of teacher observation and evaluation in assessing the most appropriate learning strategies for a particular child. The implication for regular classroom teachers here is that they need to develop their skills in assessing learning style and in matching appropriate intervention strategies to their assessments. The resultant educational plan may also have implications for the teacher for he or she may in fact have to implement all or part of the plan in the classroom. The CORE Evaluation Manual, to be discussed later, further delineates the teacher's role in the evaluation process. At the outset, the teacher must submit an account of the attempts at program modification made in the regular classroom to try to meet the child's needs.³² Additionally, the teacher completes the "Educational Assessment: Classroom Performance Summary"³³ which asks the teacher to describe, in narrative, the child's classroom performance, and the "Statements of Performance Summary"³⁴ in which the teacher determines current functioning in a variety of skill areas.

The teacher now must add another dimension to his/her role, that of assessment team member. Team working skills are integral aspects of the core process, for it is the team, through interchange and evaluation of input that must reach consensus on the most appropriate direction of the

³²CORE Evaluation Manual, Commonwealth of Massachusetts, Department of Education, Division of Special Education, First Edition, 1974, p. CET/766/F1-2.

³³Ibid., p. CET/766/F9.

³⁴Ibid., p. CET/766/F13.

particular child's education. Such skills are not necessarily part of a teacher's repertoire at the present time.

314.0 Evaluation: Referral, limitation.

Prior to referral of a school age child for an evaluation, all efforts shall be made to meet such child's needs within the context of the services which are part of the regular education program. In addition, all efforts shall be made to modify the regular education program to meet such needs.

The efforts mentioned in the above regulation calling for program modifications and alterations to meet varying needs approximate the development of individualized instructional approaches in the regular classroom. The implications for educational direction are toward the philosophy that education should meet learner needs rather than learners meeting educational needs. Implicit in regulation 314.0 is the premise that certain spectrums of learner variance can be accommodated in the regular classroom situation.

315.0 Evaluation: Determinations; required determinations.

No later than five days after the occurrence of any of the conditions described in paragraphs 315.1 through 315.6, each school committee shall insure that the following categories of school age children are referred to the person described in each such paragraph for a determination of whether a referral for an evaluation should be made.

315.1 A child in the regular education program, who, at mid-year presents a substantial risk of non-promotion. For purposes of this

paragraph, a substantial risk of non-promotion shall be considered to exist if a child is failing in two or more non-elective subjects. The principal of the school attended by such child shall receive the referral and be responsible for determining whether an evaluation should be made.

315.2 A child in the regular education program who fails to be promoted at the end of the year. The principal of the school attended by such child shall receive the referral and be responsible for determining whether a referral for an evaluation should be made.

315.3 A child in the regular education program who has been suspended for more than five school days in any quarter or permanently excluded from school. The principal of the school attended by such child shall receive the referral and be responsible for determining whether a referral for an evaluation should be made.

315.4 A child in the regular education program who has been absent without a medical excuse for more than fifteen school days in any quarter. The principal of the school attended by such child shall receive the referral and be responsible for determining whether a referral for an evaluation should be made.

All of the above segments of the regulations pertain to children in traditional educational programs who have not been previously identified as children with special needs. With regard to the question of non-promotion (315.1, 315.2), the regulations suggest that if a child is not able to make adequate progress in the regular program to the degree where promotion is in doubt or denied, an evaluation to determine the extent to which the child may require special education intervention is indicated. In some respects, this aspect of the regulations aligns the

evaluative mechanism of the school system, the criteria for promotion, with the measurement of determination of special needs.

Here, the state is saying that no longer may we "fail" youngsters in public schools without consideration of what factors may be responsible for that child's inability to achieve. The implications on past non-promotion practices in the state are great.

In regulation 315.3 regarding suspension and/or exclusion from public school, the state, through these regulations, is taking the position that such acts which deny free access to education must be regarded as a manifestation of a condition of possible special need. The child in the regular school program who has excessive unexcused absences also becomes suspect of special needs in regulation 315.6.

316.0 Evaluation: Referral; who can refer.

A school age child may be referred for an evaluation by any of the following:

316.1 A school official, including a teacher.

316.2 A parent of such child.

Heading the list of referral sources is the public school system's staff, and specifically the teachers. To a degree this aspect of the regulations implies an expansion of teacher responsibility, for now the teacher is in the position of making evaluative judgements about the needs of her students beyond the parameters of the curriculum. The teacher has the responsibility to recognize when the child's educational needs cannot be met to the fullest extent possible without special intervention. Teachers, when making such referral, are expected to have tried to adapt the traditional program to meet the child's needs and when the

attempts at modification fail, seek the evaluation of that child's learning style that the law prescribes.

The inclusion of the parent (316.2) as one of the referral sources provides an example of the attempts at increased parental involvement in educational planning that Chapter 766 mandates. The school system must respond to a referral from a parent in exactly the same prescribed fashion that is set out for responses to other referrals. Parents, who in the past found it difficult to get schools to recognize their concerns about their child's educational career, now have a legally mandated vehicle to assist them in their quest for maximum educational opportunity for their child.

320.0 Evaluation: Full core; assessments.

A full core evaluation shall consist of the following assessments adapted to the age of the school age child being evaluated and performed by personnel qualified as indicated in this paragraph or as described in paragraph 312.0:

320.1 An assessment of the child's education status by an administrative representative of the school department. Such assessment shall include a history of the child's education, an overview of the child's school progress and a statement of the child's current standing.

320.2 An assessment by a certified or approved teacher who recently had or currently has the child in a classroom or other teaching situation. Such assessment shall include:

320.2 (a) An analysis of the child's specific behavioral

abilities along a developmental continuum, with a comparison of those abilities to the tasks which are contained in the regular education program.

320.2 (b) A statement of school readiness, functioning or achievement.

320.2 (c) A statement of the child's behavioral adjustment, attentional capacity, motor coordination, activity levels and patterns, communication skills, memory and social relations with groups, peers and adults.

The assessments required under the Evaluation sections of the regulations represent a departure in procedure and manner of evaluating children. Initially, the assessment first focuses on the child's capabilities and secondly, the teacher is asked to place the child's development along a behavioral continuum. The teacher is asked for specific observations regarding behavioral skills in addition to the academic levels of performance. The implications here are that the teacher now must be more totally aware of the child in several dimensions, rather than the more comfortable academic or achievement oriented type of assessment.

322.0 Evaluation: Educational plan; general elements.

The educational plan for each school age child with special needs shall include the following:

322.1 A specific statement of the child's capabilities, i.e., what the child can do.

322.2 A specific statement of the measurable physical constraints

on these capabilities, i.e., what the child cannot do. An example of such a constraint is the paralysis of a limb or the inability to see.

322.3 A specific statement describing the child's learning style.

322.4 A specific statement of the educational goals which the child can reasonably be expected to achieve during the following three months, six months, nine months and, where appropriate, twelve months.

322.5 A specific statement of the means to be used to determine whether these goals are being achieved, including a built-in process for evaluating the success of the program by specific and measurable criteria.

322.6 A detailed plan for helping the child to achieve these goals.

In the development of the educational plan we see a major departure from the thinking of the past. This in effect becomes a statement of educational prescription. The elements of the plan call for the description of the child's learning style which is arrived at, based on the statements regarding the child's capabilities, and his/her profile based on the various assessments made during the child's evaluation. The regulations call for the team to develop the educational plan according to performance objectives (elaborately detailed in the CORE Evaluation Manual) with specific check points to assess the degree to which the child is meeting the stated objectives. The law calls for revision of the plan if at any of the quarterly intervals it is determined that the child is not meeting the objectives set out in the plan.

The rationale for the style of the educational plan is based on the belief that learning is acquired in very specific, ordered stages, and that this development can be laid out in behavioral terms. One might argue that if this is the mandated style of education for the child with special needs, then perhaps the state is making a larger statement as to how the educational process should develop in all phases of education. The review of the child's progress, outlined below, further emphasizes the state's position on behavioral and performance objectives regarding special needs youngsters.

333.0 Review of the child's progress: Ten-month and annual reviews.

Each school committee shall provide for a review of the progress of each school age child who has been placed in a special education program. Such review of each child's progress shall be completed within ten months after the initial placement of any such child and at least annually thereafter and shall be conducted according to the following:

333.1 The Core Evaluation Team which wrote the child's educational plan shall make a careful review of the child's progress based upon progress reports which have been submitted and discussions with the child's teacher, other persons working with the child and, if necessary, with the child. Such CET shall determine:

333.1 (a) Whether the child has achieved the goals set forth in the education plan.

333.1 (b) Whether the child has met the criteria which indicate readiness to enter a less restrictive program as defined in paragraph 324.2.

333.1 (c) Whether the program the child is in should be specifically modified to render it more suitable to the child's need.

The final selected items from the Regulations describe the various program prototypes available under Chapter 766, which have a bearing on the traditional educational program. The specific impact that each prototype has on the regular school is dependent upon the degree of integration within the mainstream of the school day. It should be noted that the regulations and the CORE Evaluation Manual state that each child's plan should reflect gradual movement toward the less restrictive prototype.

In developing the following prototypes, the implied statement of the legislation is that special needs youngsters derive benefit from, and make progress by being a part of the regular program.

502.0 Program prototypes.

This paragraph contains a list and description of the program prototypes.

502.1 Regular education program with modifications. Each school committee shall provide a program within this prototype to each school age child with special needs for whom a CET recommends such a program. Programs within this prototype shall have the following characteristics:

502.1 (a) The child shall be assigned to a regular education program. Except to the extent both permitted and required by the provisions of paragraph 502.1 (b), the child shall not leave such regular education program and shall be treated no differently than the other children in such program.

502.1 (a) (i) Such child shall be eligible, on the same basis as such other children, for the auxiliary and supportive services provided as part of the regular education program to which the child is assigned.

502.1 (b) The special education component of the child's program shall consist of one or more of the following:

502.1 (b) (i) Modification of the child's regular education program as specified by the CET. Such modifications shall be made by the teacher who normally conducts the child's regular education program. Personnel specified by the CET shall provide support services or training where the CET has recommended such training in place of such support services, to assist the regular education program teacher in making the specified modifications and in carrying out the requirements of the child's education.

502.1 (b) (ii) Any of the services listed in paragraph 503.1 which are specified by the CET to be provided directly to the child. Such services shall be provided within the classrooms in which the child's regular education is being conducted.

502.1 (c) The daily duration of the child's program shall be equal to that of the regular school day unless the CET states that a shorter or longer duration is in the child's best interest. In such case the child's program shall have the duration specified by the CET.

502.1 (d) For each child placed in this prototype, the school committee shall make available, to implement the child's educational plan, the personnel specified by the CET.

502.1 (e) Each school committee shall provide all aspects of programs within this prototype within public school regular education

facilities.

502.2 Regular education program with no more than 25% time out.

All of the provisions of paragraph 502.1 shall apply to programs within this prototype provided, however, that such programs shall have the following additional or different characteristics:

502.2 (a) The child shall be removed from the regular education program and classroom to receive any of the services listed in paragraph 503.1 which the CET specified should be provided to the child outside the regular education classroom, provided however, that the child shall not be removed from the regular education classroom for more than 25% of the class time of each school day.

502.2 (b) When children are removed from a regular class for services pursuant to paragraph 502.2 (a), the number of children in any one instruction group shall not exceed the following limits and shall be less if the CET so recommends and the school committee approves such recommendation.

502.1 (b) (i) Eight children for each teacher or other qualified professional.

502.1 (b) (ii) Twelve children for each teacher or other qualified professional where such teacher or such professional is assisted by one aide.

502.2 (b) (iii) Sixteen children for each teacher or other qualified professional where such teacher or professional is assisted by two aides.

502.2 (c) Each school committee shall provide all aspects of

programs within this prototype in public school regular education facilities, provided however, that a child in this prototype may be provided work study placement, occupational tryouts and job site visits outside of a public school.

502.3 Regular education program with no more than 60% time out.

All the provisions of paragraph 502.2 shall apply to programs within this prototype provided, however, that the child may be removed from the regular education program and classroom to receive services as described in paragraph 502.2 (a), for no more than 60% of the class time of each school day.

The Concept Paper of the CORE Evaluation Manual

The "Concept Paper" of the CORE Evaluation Manual presents a rationale for the core evaluation process. It supports the underlying philosophy that the assessment of special needs children should be a process, with several components, and that the result of that process is the development of an educational plan. The Concept Paper sets forth the assumption that Chapter 766 has implication for the total educational system. On page 1 of the Concept Paper the following appears:

Chapter 766 provides a unique opportunity to restructure educational evaluation as a fair and more useful process. This opportunity becomes apparent upon consideration of some of the principles which underlie the law. Chapter 766 promotes the premise that (a) all children are normal, (b) all children are different, and (c) the differences in children are normal. Educators have long known that all children are different and that these differences are statistically distributed in a normal curve. Educational planning has slowly and steadily incorporated strategies to accommodate these normal differences. Under Chapter

766 education takes the final steps toward serving all the children, some of whom will require some very special assistance to successfully participate. The evaluation techniques will be far more concerned with describing performance in terms of normalcy as opposed to past preoccupations with deviance. Evaluation under Chapter 766 will promote understanding and acceptance as opposed to discrimination.³⁵

The expanded definition of normalcy in this passage provides a comment on the function of the traditional school. The wider the scope of variance included in the concept of "normal," the greater the variance in learning styles present in the regular classroom. It would appear to follow, that with increased variance in learning style, the educational program must likewise expand its scope and flexibility to accommodate these variances.

The Concept Paper elaborates the specific rationale for the various components of the evaluation process. It establishes the commitment to parents' involvement in educational planning for their children. The paper also restates support for the legal mandate to move from diagnosis of disability to statement of capability and measured assessment of potential performance.

Regarding the use of performance objectives in the educational plan, the Concept Paper offers several supportive arguments for their use, (a) The performance objectives provide a focus of measurement, a tangible tool to determine growth and to check the appropriateness of the educational strategies recommended by the plan. (b) The use of performance objectives provide a basis for accountability, accountability of service providers as well as the accountability of the programs. The effect of

³⁵Ibid, p. CET/766/C, pp. 2 or 9.

total programs for special needs pupils can be measured by the specific progress of the students in those programs. (c) The use of performance objectives provides a basic frame of reference that is readily understood in channeling a child's efforts toward future development.

The final chapter of the Concept Paper summarizes the projected impact of Chapter 766 on all of education in Massachusetts:

Chapter 766 provides a basis for reconceptualization of the present public school system. Students will work toward individual objectives based on the results of assessments of their own performance. Both assessment results and objectives will be stated in terms of observable behaviors which can be understood by those who must implement the plan to meet those objectives. This is the beginning of a system which will be refined by experience with children. It can be an accountable system; it can provide for movement toward a broader range of student choice. Chapter 766 - the core evaluation process with the educational plan - can provide our educational system with exciting new opportunities to better know and better serve our children. It is a beginning point, but one that is hopeful and energetic as it allows for parents and educators to work together in developing and refining our complementary capabilities to best serve our children.³⁶

Here we see indication of the future implications for public education, and written evidence that Chapter 766 is not only legislative reform for special education, but possibly the beginning of reform and change in the total educational institution.

Conclusion

The special education reform legislation in Massachusetts, known as Chapter 766, has been examined in this chapter. From an analysis of the historical background of this law, we have noted the influence of court decisions and the role of organized interest groups in effecting

³⁶Ibid, p. CET/766/C, pp. 9 of 9.

educational change. Additionally, the court decisions have consistently reaffirmed the position that denial of equal educational opportunity to any school-age children is a violation of their Constitutional rights.

In the Regulations to implement Chapter 766, and in the specific, required forms of the Core Evaluation Manual, we have noted the significance of the regular classroom teacher, school administrators, and other public school personnel in the implementation of Chapter 766. The regulations introduce new program variables and alternatives into the traditional school structure. The expansion of teacher observation and evaluation functions and the mandate for regular school program accountability are also evident in the regulations.

Finally, in the CORE Evaluation Manual's "Concept Paper," we see, spelled out, some specific projections of the future implications of Chapter 766.

It is the accumulation of the above mentioned evidence which leads to the development of the position that Chapter 766 represents educational change, and thus is an appropriate subject of research on the change process.

In the research conducted in this study, Chapter 766 is the "change" vehicle which serves as the source of specific information regarding the educational change process carried out by the sample school districts in their efforts to implement the law. In Chapter III the procedures that were employed in this inquiry will be discussed.

C H A P T E R I I I

PROCEDURES

Overview

Research conducted in this study is designed to provide insight into the implementation of an educational change. The change itself, Chapter 766, is analyzed from two dimensions. Initially, census information was gathered with regard to the sample school districts and the status of Chapter 766 at the end of the first year of its implementation. The census information was collected to help evaluate demographic variables in light of the education change process.

The second dimension researched focuses upon the change process itself. The effort in this second phase of the study is to determine relationships between stated change hypotheses and the degree of implementation achieved within selected school districts. Here, effects of selected variables surrounding the process of implementation are analyzed.

Results from the two phases of the research yield insights into the change process which have a bearing on the degree of success achieved with regard to the implementation of Chapter 766 during the 1974-75 school year.

Sample Description

Chapter 766 represents mandated educational change for all school districts in Massachusetts. Being state law, each school system was required to implement the changes that Chapter 766 represents, beginning in September, 1974. The school year 1974-75, then, is the first year of

implementation of Chapter 766, and thus, is the focus of this study.

In Massachusetts, the Department of Education has set up a group of six "education regions." Each of these regions is served by a Regional Education Center Office with a staff of professionals who provide direct services to the districts within the given region. The decentralization of the State Department of Education in Massachusetts is an attempt to provide more immediate access to the local districts and to more adequately meet the individual needs of each educational region. It is through their Regional Education Centers that each school district can receive technical assistance and information regarding their education programs.

Within the Department of Education in Massachusetts, the Bureau of Special Education Intervention was charged with the responsibility of facilitating and monitoring the implementation of Chapter 766. The Bureau of Special Education Intervention had a network of representatives within each of the Regional Education Centers and it was this professional staff that guided Chapter 766's implementation in each region during the 1974-75 school year.

In the Regional Centers, the Bureau of Special Education Intervention was headed by a Project Director, who was supported by a variety of educational specialists. It was their responsibility to provide technical assistance and disseminate information regarding Chapter 766 to the local school districts. Each Regional Office Staff did so by holding workshops, participating in in-service training sessions, and frequent individual contacts with representatives of the local districts. The Regional Education Centers' Bureau of Special

Education Intervention Staff, then, became the arm of the State Department of Education in the local districts to facilitate their implementation of Chapter 766.

For purposes of this research effort, the school districts which comprised one education region, the Springfield Education Region, was the population sample researched. By limiting the study to one region, an assurance of uniformity with regard to the technical assistance and monitoring provided by the State Department of Education through the Regional Center is obtained. In the Springfield Education Region, the staff of the Regional Center's Bureau of Special Education Intervention remained constant throughout the implementation year under study, and all the districts within the study sample were serviced by this same staff.

The Springfield Education Region was selected for a variety of reasons. One, it is an education region made up of twenty-four school districts representing a manageable research sample. Two, the region represents geographic diversity running from small rural school districts to a large urban school system. Three, the school districts in the Springfield Education Region represent a socio-economic spectrum that includes low-income rural and urban populations, and affluent suburban settings. Four, the Springfield Education Region is familiar to the researcher, having been assigned to the regional office serving this region for an internship. Through this assignment, the researcher has developed an understanding of the region and established relationships with the regional staff and the school district's representatives that allows much of the data collected in this study to be available.

In conclusion, the sample in this research effort is the twenty-

four school districts which comprise the Springfield Education Region of the State Department of Education during the 1974-75 school year.

The school districts themselves were studied through the representatives of each school system most familiar with the process and problems surrounding the implementation of Chapter 766, the Special Education Administrators (SPED Administrators). It is the SPED Administrator who was the most frequent contact person between the school district and the Regional Center, and who in each school system was designated the responsibility for Chapter 766's implementation. The SPED Administrator assumed different titles from one school district to another. For example, Director of Special Education, Director of Pupil Services, and Co-ordinator of Special Services were among the most common designations of the SPED Administrator. The SPED Administrators in the Springfield Education Region attended monthly orientation meetings with the Bureau of Special Education Intervention Staff, and it was through these meetings and additional individual consultations that the school districts were provided direction in the implementation efforts. Table I lists the SPED Administrators and school district populations for the region studied.

Instrumentation

To accomplish the objectives of this research, two phases were undertaken: (1) the examination and reporting of the information collected by the Springfield Regional Education's Bureau of Special Education Intervention on their 1974-75 school year monitoring reports, and (2) the administration of a survey by the researcher.

The Springfield Education Region's Bureau of Special Education

TABLE I

Springfield Education Region School Districts 1974-75

District	Population	SPED Administrator
Agawam	5,349	Dorothy E. Bruneau
Amherst	1,905	John Burgess
Belchertown	1,307	Mary Avery
Chicopee	9,967	Barbara Gregory
Easthampton	2,637	Donald A. Welch
East Longmeadow	3,502	Donald R. Emerson
Hadley	716	Elwyn Doubleday
Hampden	1,003	Dr. Charles Harrell
Hatfield	650	George A. Ryan
Holyoke	8,990	Dr. James McDonald
Longmeadow	4,300	Eileen M. Sawyer
Ludlow	4,229	Albert H. Bail
Minnechaug Regional	1,680	Peter Gartner
Monson	1,567	Dorothy Whitaker
Northampton	4,633	Dr. George Selig
Palmer	2,535	Nancy A. Curtis
Shelburne Falls	2,300	Susan Louisignau
South Hadley	3,452	Dr. Julia Leonard
Southwick	2,100	Patricia F. Gagnon
Springfield	28,505	Dr. Mary McLean
Ware	1,675	Dr. Augustus Pesce
Westfield	7,301	George O'Brien
West Springfield	5,346	Donald Snyder
Wilbraham	2,602	Garwood Whitney

Intervention developed a monitoring format and report that was used in evaluations of each of the school districts in June, 1975. Their report was a source of information which was crucial to the conceptualization of the present study. The monitoring reports provide the following demographic data: school population, special education population, special education budget information, CORE Evaluation referral statistics, and CORE Evaluation completion statistics. From these raw data, the following analyses were computed for each district: (1) the percentage of the total school population that the special education population represents, (2) the percentage of CORE evaluations completed during the 1974-75 school year, and (3) the average per-pupil expenditure on special education pupils in each district. Each of these variables is important in relation to an evaluation of the 1974-75 school year implementation of Chapter 766.

A survey instrument was designed to provide information relative to the change process involved with the implementation of Chapter 766, as part two of the data acquisition process. The survey instrument was designed to be administered to the SPED Administrators of each of the twenty-four school districts in the research sample. They were asked to respond to eleven questions, each contributing to an understanding of the change process surrounding Chapter 766's implementation in their district.

Question 1-4 directed themselves toward measuring the degree of change Chapter 766 represented to the school district. In question "1" each of the seven required "766 program prototypes" are listed and the respondents were asked to indicate which were available prior to

TABLE II

STATE DEPARTMENT OF EDUCATION MONITORING REPORT FORM - SPRINGFIELD REGION

Division of Special Education, Springfield Region, Yearly Report

Services in Place

School District _____ Supervisor _____

School Representative _____ Title _____ Date Visited _____

School Population _____ FORM I

Program Prototype	# of students in pro- gram	# of refer- rals	# of full CORES in process	# of inter CORES in process	# of full CORES comple- ted	# of inter CORES comple- ted	# of CORES com- pleted	# of CORES incom- pleted	# of teachers	# of pro- grams
502.1										
502.2										
502.3										
502.4										
502.5 Day										
502.6 Residential										

TABLE III: SURVEY

1. Prior to September 1, 1974, when Chapter 766 went into effect, which of the following special educational programs were available in your school district?

	Yes	No
a. Regular ed. with modifications	_____	_____
b. Regular ed. with 25% or less out	_____	_____
c. Regular ed. with 60% or less out	_____	_____
d. Substantially separate	_____	_____
e. Day school program	_____	_____
f. Residential program	_____	_____
g. Home/hospital program	_____	_____

2. To what degree did your system have parental participation in the development of educational programs for special needs children prior to Chapter 766? (Check one)

20% or less 20-50% 50-80% 80% or more

3. Which components of the CORE Evaluation were routine--part of normal procedure--in evaluating youngsters in your system prior to Chapter 766? (Check which were routine)

- a. educational assessment _____
- b. medical assessment _____
- c. psychological assessment _____
- d. family/social assessment _____

3. additional _____

(Identify)

4. Regarding MAINSTREAMING (the integration of special needs pupils into regular programs): to what extent has Chapter 766 made a change in your district's handling of special education programming?

little change moderate change substantial change

5. Mention school practices which have been changed within your school district over the past three years (other than those practices initiated in conjunction with Chapter 766).

Practices Changed _____ Year of Change _____

6. Who, within your district, was primarily responsible for initiating and carrying out the changed school practices mentioned in item 5?

Practices Changed _____ Responsible Person (title) _____

7. Identify the extent to which the following personnel in your school district were involved in LEADING your school district's efforts at implementing Chapter 766 during the 1974-75 school year.

	<u>Minimum</u>	<u>Moderate</u>	<u>Substantial</u>
a. School Committee	_____	_____	_____
b. Superintendent	_____	_____	_____
c. Assistant Superintendent	_____	_____	_____
d. Special Education Administrator	_____	_____	_____
e. Principals	_____	_____	_____
f. Teachers	_____	_____	_____
g. Consultants	_____	_____	_____
h. Other (identify)	_____	_____	_____

8. What methods (i.e., workshops, institutes, etc.) were considered for implementing changes suggested by Chapter 766 in your school district?

9. What method or methods were actually chosen and utilized to help initiate changes suggested by Chapter 765 within your school district?

- a. Which group or groups (i.e., teachers, parents, etc.) were the INITIAL target or strategies designed to initiate Chapter 766 legislation within your district?

- b. Was/were people in this/these initially target group(s) then used in any planned way to help others become involved in the implementation of Chapter 766? Explain.
 - c. Which group or groups were secondary targets of strategies designed to initiate Chapter 766 legislation within your district?
10. Who was responsible primarily for carrying out the various tasks suggested in questions 8 and 9?

<u>Task</u>	<u>Responsible Person Title</u>
-------------	---------------------------------

11. To provide data for the State Department of Education's required amendment to your district's educational plan, each district had to assess new program needs. How were special education program needs identified in your school district? Mention who gathered the data and how this information influenced decision making relative to new programs under Chapter 766.

September, 1974. Parental participation prior to Chapter 766 is reported in ranges on the survey: 20% or less, 20-50%, 50-80% and 80% or more.

In question "3," the four essential components of a CORE Evaluation required under Chapter 766 were listed, and those responding were to indicate which of these were "routine" procedures in their school district prior to Chapter 766's mandate. The fourth question asks for an indication of the effect of "mainstreaming" on prior practice in the school district. "Mainstreaming" involves the integration of "special needs" pupils in regular education programs whenever possible. The philosophy of mainstreaming, inherent in Chapter 766, alters the traditional approaches of "special classes" and separate programs for special education pupils. Each SPED Administrator indicated in this question the extent of change "mainstreaming" represented to their school district's special education programming. Three categories of response were provided: (1) little change, (2) moderate change, and (3) substantial change.

In questions "5" and "6" on the survey, the prior involvement with educational change in each school district was the focus. Question "5" asked respondents to list educational practices changed over the past three years in the school district, and question "6" asked the respondents to indicate the sources of leadership for each of the changes mentioned.

Question "7" listed a variety of educational personnel and an open-ended "other," and asked that each of the personnel be rated as to their leadership role in the school district regarding the implementation of

Chapter 766 during the 1974-75 school year. The categories available for each of the personnel were: "minimum," "moderate," and "substantial" with regard to their leadership involvement with Chapter 766.

In questions "8" and "9," the focus is on determining the variety of change strategies available to the school districts as well as the actual change methods chosen by the schools. Question "9" had three subheadings asking for information as to the "initial targets" of educational change strategies, the degree to which these initially targeted recipients of change strategies were used in subsequent change efforts, and who the "secondary" targets of change efforts were.

Sources of leadership in the actual implementation of the change strategies identified in question "9" were requested responses in conjunction with question "10," and in the eleventh question the area of "needs assessment" was addressed, with an open-ended question surrounding the sources, methods, and uses of needs assessment information regarding Chapter 766 needs in the school district.

The data collected in the two phases of the research was organized and collated in a variety of ways to provide information for the analysis reported in Chapter V. Initially, data from the State Department Monitoring reports was used to compute certain statistical information that can be used for school district comparison purposes.

The total school district population of each district was divided by the total reported "special needs" population to produce a percentage of special needs pupils in each school district. This percentage figure allows the researcher to compare the school districts with regard to their percentage of "special needs" pupils.

The information from the State Department Monitoring Reports regarding CORE Evaluations was used to determine the degree of implementation achieved by the school districts. In the reports, the number of students referred for CORE Evaluation was recorded, and this figure was divided by the number of completed CORE Evaluations, which provided the percentage of completed 766 evaluations for each school district. The percentage factor, regarding completed CORE Evaluations is the figure which was used as an indication of the degree of implementation achieved by the school district, because in order to complete CORE Evaluations, the district had to have in practice the necessary elements of the CORE Evaluation required under the law. In addition, the completion of the CORE process represents the implementation of the appropriate program and thus, this same statistic indicates the percentage of children that programs were provided for. This factor, the percentage of completed CORE Evaluations, is used as an indication of the degree of implementation achieved, for it does not measure the quality of the implementation, a variable outside the scope of this study.

The percentage of completed CORE Evaluations computed for each district forms the basis for categorizing the districts for purposes of this research. To test the hypotheses presented in this study, it is necessary to isolate those school districts "most fully implemented" and those school districts "least fully implemented" so that comparisons can be made with regard to the variables stated in each hypothesis.

The final information gleaned from the State Department Monitoring Reports involves the computing of the per-pupil expenditure for special education. On the Monitoring Reports, school districts recorded their

total budget expenditures for Chapter 766 (all special education services) during the school year, 1974-75. This total amount was then divided by the total number of students identified as having "special needs," the result being an "average per-pupil expenditure" for special education. The amount represents an "average" as it includes those pupils in costly individual out-of-district placements as well as those minimally serviced by tutors or itinerant personnel. The per-pupil expenditures were categorized for purposes of this research into "high" per-pupil expenditures, "medium" per-pupil expenditures, and "low" per-pupil expenditures as described in the data analysis section of this chapter.

Survey data collected by the researcher forms the basis for the second stage of the research study. A survey was developed to test specific change hypotheses. The survey was administered to the SPED Administrators of the Springfield Education Region at a regular SPED Administrators meeting, January 22, 1976. Eighteen of the twenty-four SPED Administrators who comprise the region were present at the meeting and were given the survey material and directions at that time. The researcher remained at the meeting while the Administrators completed the survey to answer any questions that arose. Administration of the survey instrument from introduction to completion of the last questionnaire took 42 minutes.

Subsequently, a copy of the survey instrument was mailed to each of the six SPED Administrators who were absent at the meeting when the survey was administered. A letter of explanation accompanied the mailing. Three of the SPED Administrators responded to the mailed request

by returning the completed survey. (Note: of the six SPED Administrators mailed questionnaires, three hold doctoral degrees, and it was these same three who responded to the mailing.) In summary, twenty-one of the twenty-four school districts in the sample submitted completed survey instruments to the researcher.

The survey itself was designed to measure several specific factors relating to educational change. The first four items on the survey were designed to provide an indication of the school district's readiness for the implementation of Chapter 766. In order that each of the school districts could be compared with regard to their readiness, a method of summarizing the data on the four survey items was devised by the researcher.

In question "1" each of the seven prototypes was given a value of four points. A total score of 28 was awarded to a district that responded "yes" to each prototype's availability prior to September, 1974. Question "2" had four possible choices, on a continuum from 0-100% of involvement of parents in educational programming for special education pupils. Each of the four categories (20% or less, 20-50%, 80% or more) were assigned seven points and the responses scored in a cumulative manner from seven to twenty-eight as the identified percentage increased.

Question "3" asked respondents to identify those components of the CORE Evaluation which were routine prior to September, 1974 and the implementation of Chapter 766. Four essential and minimal components required in the regulations pertaining to Chapter 766 were listed and an open-ended option "other" provided. For each of the CORE Evaluation

components identified as routine prior to Chapter 766, the school district was given seven points.

In question "4" the degree of change "mainstreaming" represented to the school district was recorded. Each of the three possible responses were assigned nine points and these were summed in a cumulative fashion from nine points for a response to "substantial change" to 27 for a response to "little change."

By summing the total scores of each school district in each of these questions, a "766 Change Indicator" rating was achieved. As the scores increase, the school district moved closer to having in practice those requirements of Chapter 766. The lowest score represents the school district with the greatest degree of change required to implement Chapter 766. The use of the "766 Change Indicator" allows the researcher to measure and compare each school district's readiness to implement Chapter 766 before the mandated implementation date of September, 1974. The computation of a numerical ranking for the school districts makes it possible to apply the "766 readiness factor" to the research hypothesis related to that variable in the data analysis of this study.

The survey questions "5" and "6" were reported as the responses on the survey indicated. Those educational innovations reported by the school districts were organized to indicate those districts with (a) significant recent involvement with educational change, (b) moderate involvement with educational change, and (3) those who reported no recent change involvement. If a district indicated three or more recent change implementations, outside of Chapter 766, they were rated as having "significant" prior change involvement. A school district reporting one

or two recent change implementations was rated as having "moderate" prior change involvement. The ratings, as to prior experiences with educational change, were used as input in the testing of change hypotheses.

In question "8," the survey asked respondents to identify those methods or strategies considered to facilitate the implementation of Chapter 766. Question "9" solicited information about methods actually used by the school district. The purpose here is to gain some measure of the extent to which each district evaluated the possible options and strategies for implementing educational change, and the resources available to the school district to assist in their change efforts.

Question "9," parts a, b, and c, request further clarification of the particular change strategies chosen by the school district. Part "a" asks who the initial targets of the implementation efforts were. Part "b" asks if these initially targeted groups were then used in any planned way to train others. Part "c" asks which group or groups were the object of secondary implementation efforts. The intention with these questions is to ascertain clarification of the methods chosen and the degree to which "early adopters" are used to facilitate the training of the "laggards."

The purpose of question "10" is to determine the leadership sources of the change efforts directed at the implementation of Chapter 766 in the school district. Question "11" addresses itself to the area of the acquisition of needs assessment information. Both of these items were recorded as they were responded to, and they provide another source of information to measure against hypotheses discussed in Chapter V.

Data Analysis

The research conducted in this study is an ex post facto design. The variables under study (i.e., percentage of CORE Evaluations completed, degree of readiness to implement Chapter 766, amount of money invested in special education in each school district, etc.) are beyond the control of the researcher and thus are non-manipulatable. The school districts in the population studied have completed their initial implementation efforts for the school year 1974-75. Some districts were able to achieve a greater degree of implementation than others, and it is the purpose of this study to determine in retrospect what factors affected the school district's ability to implement the law.

The variables affecting the implementation of Chapter 766 under study here are a matter of record for each school district. The researcher's intent is to utilize a series of hypotheses as a frame of reference for studying relationships which may exist among the selected variables. Ultimately, through this study, some insight into the change process in education may be derived which can contribute to a fuller understanding of those factors which facilitate or hinder the implementation of educational change.

In the ex post facto research design of this study, those implementation categories which have occurred (i.e., most fully implemented districts with regard to Chapter 766, least fully implemented school districts with regard to Chapter 766, etc.) are researched through data collection and analysis related to a series of hypotheses.

The measure of the degree of implementation achieved by the school districts has been established by the data reporting the percentage of

completed CORE Evaluations during the 1974-75 school year. This statistic serves to indicate the "degree of implementation" achieved. The "most fully implemented" school districts are those LEA's reporting ninety (90%) percent completed CORE Evaluations or better, the "least fully implemented" school districts are those LEA's reporting less than seventy (70%) percent CORE Evaluation completion. The following table illustrates the school districts' standings with regard to the percentage of completed CORE Evaluations for the 1974-75 school year.

Once the categories of implementation were established, the data collected in the study was analyzed in a comparative manner comparing each of the variables as they occurred in the "most fully implemented" school districts with their occurrence in the "least fully implemented" districts.

The basic design of this study, as an ex post facto research effort, is a modification of an experimental research design in which two groups are compared on an independent variable. The major difference and limitation between the experimental and ex post facto design is in the lack of control over the variables in question in the ex post facto research type. With this in mind, no attempt is made in this study to reach definitive causal relationships. The main objective is to measure tendencies toward meaningful attributes of the change process in education and to provide a direction for future research.

To more fully illustrate the meaning of the data collected and its relationship to the change process, two stages of data analysis are employed in this study. The change related variables researched were incorporated within null hypotheses so that statistical analysis of the

TABLE IV

% CORE Evaluations Completed During
1974-75 School Year

<u>Percentage</u>	<u>District</u>
33	Wilbraham
36	Minnechaug Regional
40	Springfield
42	Holyoke
53	Easthampton
61	Ware
69	Shelburne Falls
71	Northampton
71	Southwick
76	Hadley
76	Monson
84	Chicopee
84	East Longmeadow
84	Westfield
85	South Hadley
90	Longmeadow
91	Belchertown
92	Hatfield
94	Agawam
96	Ludlow
96	Palmer
98	West Springfield

No Data Available: Amherst and Hampden

data using the chi-square formula could be applied when possible. The chi-square analysis offers statistical evidence of significance with regard to each of the change variables and fits the research design in that the clearly identified groupings of the school districts in the district have been established (i.e., "most fully implemented," "least fully implemented," and those in between, "moderately" implemented). The chi-square formula allows an analysis of data for each school district by category and measures the observed incidence of variables against the expected incidence. The degree to which the observed differs from the expected provides the measure of significance of the variable under investigation. The chi-square formula is as follows:

$$\chi^2 = \frac{(O-E)^2}{E}$$

χ^2 = the value of chi-square

O = the observed frequency in each cell

E = the expected frequency in each cell

The chi-square statistic which results in this computation is then referred to a standardized chi-square table to be checked for significance. For purposes of this research, a significance level of .05 must be achieved to reject the null hypotheses. This degree of significance is a generally accepted statistical significance level.

The computation of the chi-square formula was accomplished in this study through cross-tabulation computer analysis. The data was coded and cards punched for each school district, and the chi-square computation printed out by the computer. These tables appear after each hypothesis in Chapter 5 with a description of analysis procedure employed.

The null hypotheses researched are as follows:

- I There is no relationship between LEA enrollment and the degree of implementation of Chapter 766 achieved.
- II There is no relationship between the percentage of special needs population of the LEA and the degree of implementation achieved.
- III There is no relationship between the amount of money invested in special education by the LEA and the degree of implementation of Chapter 766 achieved.
- IV There is no relationship between the amount of change required to implement Chapter 766 and the degree of implementation achieved.
- V There is no relationship between prior involvement with educational change or innovation and the degree of implementation of Chapter 766 achieved.
- VI There is no relationship between LEA leadership patterns and the degree of implementation of Chapter 766 achieved.
- VII There is no relationship between the effort invested to identify and utilize optimum methods to implement the Chapter 766 law and the degree of implementation of Chapter 766 achieved.
- VIII There is no relationship between the acquisition of needs assessment information and the degree of implementation of Chapter 766 achieved.
- IX There is no relationship between the degree to which

early adopters of educational change are utilized to influence laggards and the degree of implementation of Chapter 766 achieved.

The statistical analysis of the data in this research study has certain limitations due to the small size of the sample. Even with the chi-square analysis, the chances of finding statistical significance in a sample of the size studied here is low and therefore the application of statistical analysis can be expected to provide indices of significance rather than significance itself. For this reason, a narrative interpretation of the data is also presented with regard to each of the hypotheses.

CHAPTER IV

THE DATA

Introduction

Data collected is presented in this chapter as reported by each school district in the study sample. For each school district, the information from the two components of the research, (1) the State Department of Education Monitoring Reports of June, 1975 and (2) the survey administered by the researcher, is organized in chart form followed by a narrative presentation of each item. The information reflects the state of the school districts in June, 1975, the last month of the school year 1974-75, the initial year of implementation of Chapter 766.

Nine categories of data are reported for each school district on the charts and eight in the narrative descriptions. In the narrative, the two categories relating to population statistics (total school population and special needs pupils' population) are combined. Following is a description of each category and the method of determining the information reported.

Data From State Department Monitoring Reports

1. School Population--Represents the actual enrollment of the total population of the school district reported in June, 1975. In this sample, the population figures were broken down into three categories: (1) high, 5,000 and above; medium, 2,500-4,999, and (3) low, 1-2,499.

2. SPED Population--Represents the total special education

population serviced in the school district as of June, 1975. This information is followed by a percentage figure which represents the percentage of the total school population that has been identified as "special needs."

3. SPED Per-Pupil Expenditure--Represents the total amount of monies allocated in the school budget for special education (Chapter 766), divided by the total number of pupils serviced as "special needs" pupils. For purposes of this study, the per-pupil expenditures for special education were broken down into three categories: (1) high, \$1,600 and above; (2) medium, \$700-\$1,599, and (3) low, \$699 and below.

4. CET Completion--Represents the percentage of CORE Evaluations completed as of June, 1975 based on the total reported referrals.

Data From Research Survey

5. 766 Change Indicator--Represents an arithmetic indicator of the degree of change required to implement Chapter 766 in the school district. Each of the characteristics required to implement Chapter 766 were assigned an equal numerical weight, and from the survey responses those that were in place in the school district prior to September, 1974 were summed. The total sum is numerically higher as the number of changes Chapter 766 required of the school district diminishes.

Example: Holyoke = 54, Springfield = 100.

Thus, Springfield reported that they had a significant number of "766 required" characteristics in place prior to the date of mandated implementation. Holyoke had fewer. Therefore, Holyoke had to accomplish a greater degree of change in order to implement Chapter 766.

The 766 required characteristics reported on in this aspect of the research are:

1. (7) program prototypes
2. degree of parental involvement
3. (4) elements of CORE Evaluation
4. effect of "mainstreaming"

6. Change/Innovation History--Represents the school district's recent change or innovation efforts, other than those surrounding the implementation of Chapter 766, as reported on the survey instrument.

The recent history of educational change in the school district provides an indication of that school district's experience with implementing change and can serve to increase our perception of the school district's readiness and facility to implement the educational change required by Chapter 766.

7. 766 Change Leadership--Represents the responses on the survey instrument regarding the sources of leadership within the school district during the school year 1974-75 devoted to directing the implementation of Chapter 766.

8. 766 Change Method--Represents the methods employed by the school district to facilitate the implementation of Chapter 766. Three categories of information were solicited in this area:

- A. Actual methods employed
- B. Initial targets of the change strategies
- C. The degree to which the initial targets were used in subsequent follow-up training efforts.

9. Needs Assessment--Represents the sources of needs assessment information to be used in planning further implementation efforts regarding Chapter 766 within the school district

Summary of Selected Data

Data collected are summarized in the form of "range" and "mean" figures, where this computation is possible, for five of the categories: (1) school population, (2) SPED population percentage, (3) SPED per-pupil expenditure, (4) percentage of CORE Evaluations completed, and (5) 766 Change Indicator.

(1) School Population

Range = 650-28,505

Mean = 4,510

(2) Percentage of SPED Population

Range = 3.25%-17.79%

Mean = 8.74%

(3) SPED Per-pupil Expenditure

Range = \$212-\$3,460

Mean = \$1,224

(4) Percentage of Completed CORE Evaluations

Range = 33%-98%

Mean = 73.72%

(5) Change Indicator Rating

Range = 54-100

Mean = 72.57

School District Data

Data compiled are presented by LEA initially and then across LEAs as appropriate. A chart has been prepared for each LEA which summarizes data derived from the two survey sources according to nine concerns. Results are interpreted separately according to pre-determined criteria following the presentation of each summary chart. Then, four of the concerns are summarized across LEAs and reported at the conclusion of Chapter IV.

SCHOOL DISTRICT

AGAWAM

1. School Population	Number 5,349	Category High
2. SPED Population	Number 366	Category 6.84%
3. Per-Pupil Expenditure (Special Education)	Amount \$1,280	Category Medium
4. CET Completion	Number 217	Percentage 94%
5. 766 Change Indicator	Number 64	
6. Change/Innovation History	Reported Work-Study Program Distributive Education Program	
7. 766 Change Leadership	Substantial Asst. Superintendent SPED Administrator Moderate Superintendent Principals, Teachers Minimum School Committee Consultants	
8. 766 Change Method	Method Workshops; In-Service; Staff meetings in school Targets SPED Staff Follow-Up Yes Administrators, Parents and Teachers	
9. Needs Assessment	Sources Administrative suggestions; SPED Staff suggestions; teacher referrals	

AGAWAM

- 1.* High population district with 6.84% of the population identified as "special needs," below mean score of group, 8.74%.
2. "Medium" special education per-pupil expenditure, \$1,280, close to mean of \$1,224.
3. Completed 94% of referred CORE Evaluations, above mean for group of 73%.
4. Degree of change rating = 64, eight points below mean of 72.
Item Analysis:
 - a. Prior to 9/74, Agawam lacked prototypes "c" and "f."
 - b. Prior to 9/74, parental participation rated as 20%-50%.
 - c. Prior to 9/74, all components of CORE Evaluation were routine.
 - d. "Mainstreaming" represented a substantial change to Agawam.
5. Prior change history was secondary education oriented and involved vocational options. Implementation originated with administration and guidance counselors.
6. 766 change leadership came from administration, was directed toward special services staff, and they were then used to train regular staff.
7. Workshops and in-service training were the 766 methods of implementation and these were originated by administration.
8. Needs assessment information collected by SPED Administrator from staff input and analysis of teacher referrals.

*NOTE: Information reported as items 1 and 2 on the School District summary chart are pooled as one item on each page--like the above--earmarked for interpretation.

SCHOOL DISTRICT

AMHERST

1.	School Population	Number 1,905	Category Low
2.	SPED Population	Number 339	Percentage 17.79%
3.	Per-Pupil Expenditure (Special Education)	Amount \$1,009	Category Medium
4.	CET Completion	Number No Data Available	Percentage
5.	766 Change Indicator	Number 87	
6.	Change/Innovation History	Reported Individualized Instruction Educational Alternative Models Cluster Grouping	
7.	766 Change Leadership	Substantial Moderate Minimum	Asst. Superintendent SPED Administrator Principals School Committee Superintendent Teachers Consultants
8.	766 Change Method	Method Targets Follow-Up	Workshops Teachers, Parents and Administrators None
9.	Needs Assessment	Sources	Parent Group coordinated by SPED Director and teachers.

AMHERST

1. "Low" population district with 17.79% of the population identified as "special needs," more than twice the mean score of 8.74% for the group.
2. "Medium" special education per-pupil expenditure, \$1,009, below mean of \$1,224.
3. No data available of percentage of CORE Evaluations completed.
4. Degree of change rating = 87, well above the mean of 72.

Item Analysis: a. Prior to 9/74, Amherst lacked prototypes "d" and "e."

b. Prior to 9/74, parental participation rated as 50-80%.

c. Prior to 9/74, all components of CORE Evaluation were routine.

d. "Mainstreaming" represented a moderate change to Amherst.

5. Prior change history was reported as comprehensive in scope and variety. Implementation of change in Amherst has historically been cooperative effort of administration, teachers and parents.
6. 766 change leadership was administrative and directed toward teachers, parents and principals. No follow-up use of trained personnel in future implementation efforts was reported.
7. Workshop format was the primary change mechanism.
8. Needs assessment gathered by SPED Administrator from teachers and parent groups.

SCHOOL DISTRICT

BELCHERTOWN

1.	School Population	Number 1,307	Category Low
2.	SPED Population	Number 116	Percentage 8.87%
3.	Per-Pupil Expenditure (Special Education)	Amount \$1,436	Category Medium
4.	CET Completion	Number 21	Percentage 91%
5.	766 Change Indicator	Number No Data Available	
6.	Change/Innovation	Reported No Data Available	
7.	766 Change Leadership	Substantial No Data Available Moderate Minimum	
8.	766 Change Method	Method No Data Available Targets Follow-Up	
9.	Needs Assessment	Sources No Data Available	

BELCHERTOWN

1. "Low" population district with 8.84% of the population identified as "special needs," near the mean of 8.74%.
2. Upper level of "medium" range for special education per-pupil expenditure, \$1,436, above mean for group of \$1,224.
3. Completed 91% of referred CORE Evaluations, above mean for group of 73%.
4. No data available.
5. No data available.
6. No data available.
7. No data available.
8. No data available.

SCHOOL DISTRICT

CHICOPEE

1.	School Population	Number 9,967	Category High
2.	SPED Population	Number 903	Percentage 9.05%
3.	Per-Pupil Expenditure (Special Education)	Amount \$733	Category Medium
4.	CET Completion	Number 247	Percentage 84%
5.	766 Change Indicator	Number 82	
6.	Change/Innovation History	Reported None	
7.	766 Change Leadership	Substantial Asst. Superintendent SPED Administrator Principals Moderate Superintendent Teachers and SPED Staff Minimum School Committee Consultants	
8.	766 Change Method	Method Workshops In-service Training Targets Teachers, Principals and SPED Staff Follow-Up Yes SPED Staff in buildings	
9.	Needs Assessment	Sources None done	

CHICOPEE

1. "High" population district with 9.05% of the population identified as "special needs," above the mean score of the group, 8.74%.
2. "Medium" special education per-pupil expenditure, \$733, below the mean of \$1,224.
3. Completed 84% of referred CORE Evaluations, above the mean for group of 73%.
4. Degree of change rating = 82, ten points above the mean for the group of 72.

Item Analysis:

- a. Prior to 9/74, Chicopee lacked prototypes "e" and "f."
- b. Prior to 9/74, parental participation rated as 20% or less.
- c. Prior to 9/74, all components of CORE Evaluation were routine.
- d. "Mainstreaming" represented little change to Chicopee.

5. No recent experience with implementation of educational change was reported.
6. 766 Change leadership came from administration, was directed toward SPED staff, teachers and principals, the SPED staff was used to train others in individual school buildings.
7. Workshops and in-service training were the methods of implementation for Chapter 766. The SPED administrator was responsible for originating the change efforts.
8. Needs assessment information not collected in Chicopee.

SCHOOL DISTRICT

EASTHAMPTON

1.	School Population	Number 2,637	Category Medium
2.	SPED Population	Number 108	Percentage 4.09%
3.	Per-Pupil Expenditure (Special Education)	Amount \$1,728	Category High
4.	CET Completion	Number 106	Percentage 53%
5.	766 Change Indicator	Number No Data Available	
6.	Change/Innovation History	Reported No Data Available	
7.	766 Change Leadership	Substantial No Data Available	
		Moderate No Data Available	
		Minimum No Data Available	
8.	766 Change Method	Method No Data Available	
		Targets No Data Available	
		Follow-Up No Data Available	
9.	Needs Assessment	Sources No Data Available	

EASTHAMPTON

1. "Medium" population district with 4.09% of the population identified as "special needs," below the mean score of 8.74%.
2. "High" special education per-pupil expenditure, \$1,728, above the mean of \$1,224.
3. Completed 53% of referred CORE Evaluations, below the mean for the group of 73%.
4. Degree of Change rating = No data available.
5. No data available.
6. No data available.
7. No data available.
8. No data available.

SCHOOL DISTRICT

EAST LONGMEADOW

1.	School Population	Number 3,502	Category Medium
2.	SPED Population	Number 136	Percentage 3.88%
3.	Per-Pupil Expenditure (Special Education)	Amount \$2,235	Category High
4.	CET Completion	Number 64	Percentage 84%
5.	766 Change Indicator	Number 62	
6.	Change/Innovation History	Reported None	
7.	766 Change Leadership	Substantial	SPED Administrator Consultants SPED Teachers
		Moderate	School Committee Superintendent Principals
		Minimum	Asst. Superintendent Teachers
8.	766 Change Method	Method	Workshops Administrative Meetings
		Targets	SPED Teachers
		Follow-Up	Yes - Workshops Regular Teachers Administrators
9.	Needs Assessment	Sources	SPED Administrator and staff

EAST LONGMEADOW

1. "Medium" population district with 3.88% of the population identified as "special needs" well below the mean score of the group of 8.74%.
2. "High" special education per-pupil expenditure, \$2,235, well above the mean of \$1,224.
3. Completed 84% of referred CORE Evaluations, above the mean of 73%.
4. Degree of change rating = 62, ten points below the mean of 72.

Item Analysis:

- a. Prior to 9/74, East Longmeadow lacked prototypes "b," "c" and "d."
- b. Prior to 9/74, parental participation rated as 20% or less.
- c. Prior to 9/74, components of CORE evaluation were routine except for "d."
- d. "Mainstreaming" represented a moderate change to East Longmeadow.

5. Prior change history was reported as "none."
6. 766 change leadership came from the Director of Special Education, and was directed toward special education teachers who were then used in workshops for regular classroom teachers.
7. Workshops and administrative meetings were the methods of implementation for Chapter 766.
8. Needs assessment information was collected by SPED administrator and staff.

SCHOOL DISTRICT

HADLEY

1.	School Population	Number 716	Category Low
2.	SPED Population	Number 118	Percentage 16.48%
3.	Per-Pupil Expenditure (Special Education)	Amount \$517	Category Low
4.	CET Completion	Number 88	Percentage 76
5.	766 Change Indicator	Number 77	
6.	Change/Innovation History	Reported Mathematics Lab Developmental Reading Lab	
7.	766 Change Leadership	Substantial Superintendent SPED Administrator Psychologist Moderate School Committee Principals, Teachers Consultants Minimum	
8.	766 Change Method	Method In-service Training (through grant) Targets Teachers, Principals, SPED staff Follow-Up Yes - Training Teams Buildings and Parents	
9.	Needs Assessment	Sources Principals Parent Groups Census Training Teams Recommendations	

HADLEY

1. "Low" population district with 16.48% of the population identified as "special needs," above the mean score of the group, 8.74%.
2. "Low" special education per-pupil expenditure, \$517, below the mean of \$1,224.
3. Completed 76% of referred CORE Evaluations, above the mean for the group of 73%.
4. Degree of change rating = 77, five points above the mean of 72.

Item Analysis: a. Prior to 9/74, Hadley lacked prototypes "a," "c," "e" and "f."

b. Prior to 9/74, parental participation rated as 80% or more.

c. Prior to 9/74, all components of CORE Evaluation were routine.

d. "Mainstreaming" represented a substantial change to Hadley.

5. Prior change history involved the implementation of Math lab and Developmental Reading lab. Math lab originated with teachers and the reading lab with the reading specialist under the direction of the superintendent and the building principals.
6. 766 Change leadership came from Administrator of Special Education and the implementation of an in-service training program under a grant. The focus of the training was on group leaders, CET team chairpersons who established training teams to diffuse throughout the system.
7. Weekly in-service training was provided under the grant.
8. Needs assessment information was collected by SPED Administrator from principals, parent groups, census, and training teams recommendations.

SCHOOL DISTRICT

HAMPDEN

1.	School Population	Number 1,003	Category Low
2.	SPED Population	Number 110	Percentage 11.30%
3.	Per-Pupil Expenditure (Special Education)	Amount \$212	Category Low
4.	CET Completion	Number No Data Available	Percentage
5.	766 Change Indicator	Number 65	
6.	Change/Innovation History	Reported None	
7.	766 Change Leadership	Substantial	SPED Administrator Principals
		Moderate	Superintendent
		Minimum	School Committee, Teachers, Consultants
8.	766 Change Method	Method	In-service Training
		Targets	Parents Teachers
		Follow-Up	No
9.	Needs Assessment	Sources Steering Committee made up of Administrators and CET Personnel	

HAMPDEN

1. "Low" population district with 11.30% of the population identified as "special needs," above the mean score of 8.74%.
2. "Low" special education per-pupil expenditure, \$212, well below the mean of \$1,224, and represents the lowest reported.
3. Completion of CORE Evaluations data not available.
4. Degree of change rating = 65, seven points below mean of 72.
Item Analysis:
 - a. Prior to 9/74, Hampden reported all proto-types available.
 - b. Prior to 9/74, parental participation rated as 20% or less.
 - c. Prior to 9/74, components of CORE Evaluation were routine with the exception of "c."
 - d. "Mainstreaming" represents a substantial change to Hampden.
5. No prior change experience reported.
6. 766 change leadership came from the SPED Administrator and was directed toward parents and teachers. No follow-up use was made of the initial targets.
7. In-service training was the method of implementation of Chapter 766.
8. Needs assessment information collected by SPED Administrator from steering committee made up of administrators and CET personnel.

SCHOOL DISTRICT

HATFIELD

1.	School Population	Number 650	Category Low
2.	SPED Population	Number 92	Percentage 14.15%
3.	Per-Pupil Expenditure (Special Education)	Amount \$423	Category Low
4.	CET Completion	Number 85	Percentage 92%
5.	766 Change Indicator	Number 63	
6.	Change/Innovation History	Reported None	
7.	766 Change Leadership	Substantial Moderate Minimum	SPED Administrator School Committee, Superintendent, Principals, Teachers
8.	766 Change Method	Method Targets Follow-Up	In-Service Workshops Community Outreach, Newspaper Teachers Yes - Needs Analysis Parents and Community
9.	Needs Assessment	Sources Superintendent Principals SPED Director Teacher Feedback Parent Feedback	

HATFIELD

1. "Low" population district with 14.15% of the population identified as "special needs," above the mean of 8.74% for the sample population.
2. "Low" special education per-pupil expenditure, \$423, well below the mean of \$12,224.
3. Completed 92% of referred CORE Evaluations, above the mean of 73% for the group.
4. Degree of change rating = 63, nine points below the mean of 72.

Item Analysis: a. Prior to 9/74, Hatfield lacked prototypes "c," "d," "e" and "f."

b. Prior to 9/74, parental participation rated as 20-50%.

c. Prior to 9/74, all components of CORE Evaluation were routine.

d. "Mainstreaming" represented a substantial change to Hatfield.

5. Prior change history was reported as "none."
6. 766 change leadership came from SPED Administrator, was directed toward teachers who were then used to do needs analysis and community workshops.
7. In-service workshops and community outreach in the form of newspaper articles and speeches were the methods used to implement Chapter 766.
8. SPED Administrator met with superintendent, principals and others to discuss feedback from teachers and parents.

SCHOOL DISTRICT

HOLYOKE

1.	School Population	Number 8,990	Category High
2.	SPED Population	Number 293	Percentage 3.25%
3.	Per-Pupil Expenditure (Special Education)	Amount \$3,460	Category High
4.	CET Completion	Number 293	Percentage 42%
5.	766 Change Indicator	Number 54	
6.	Change/Innovation History	Reported None	
7.	766 Change Leadership	Substantial Moderate Minimum	SPED Administrator Asst. Superintendent Consultants School Committee Superintendent Principals, Teachers
8.	766 Change Method	Method Targets Follow-Up	In-service Training Parents Teachers Yes - As influence on School Committee
9.	Needs Assessment	Sources SPED Director	

HOLYOKE

1. "High" population district with 3.25% of the population identified as "special needs," well below the mean score of 8.74% for the group.
2. "High" special education per-pupil expenditure, \$3,460, well above the mean for the group of \$1,224, and the highest reported in the sample.
3. Completed 42% of the referred CORE Evaluations, well below the mean for the group of 73%.
4. Degree of change rating = 54, well below the mean of 72, and the lowest ranking in the population sample.

Item Analysis: a. Prior to 9/74, Holyoke lacked prototype "c."

b. Prior to 9/74 parental participation rated as 20% or less.

c. Prior to 9/74, components of CORE Evaluation lacking were "b" and "d."

d. "Mainstreaming" represented a substantial change to Holyoke.

5. No prior change experience reported in Holyoke.
6. 766 change leadership was primarily the responsibility of the SPED Administrator who directed primary efforts toward parents. Parents in turn influenced superintendent and school committee decision making.
7. In-service workshops were methods of implementing change under Chapter 766.
8. SPED Administrator assessed needs.

SCHOOL DISTRICT

LONGMEADOW

1.	School Population	Number 4,300	Category Medium
2.	SPED Population	Number 219	Percentage 5.09%
3.	Per-Pupil Expenditure (Special Education)	Amount \$1,673	Category High
4.	CET Completion	Number 58	Percentage 90%
5.	766 Change Indicator	Number 70	
6.	Change/Innovation History	Reported None	
7.	766 Change Leadership	Substantial	Superintendent SPED Administrator SPED Staff
		Moderate	School Committee Asst. Superintendent Principals, Teachers
		Minimum	Consultants
8.	766 Change Method	Method	Workshops Teacher Training
		Targets	School Adjustment Counselors
		Follow-Up	Yes - SAC deployed to schools. Administra- tors, Teachers, Parents
9.	Needs Assessment	Sources SPED Staff	

LONGMEADOW

1. "Medium" population district with 5.09% of the population identified as "special needs," below the mean of 8.74% for the group.
2. "High" special education per-pupil expenditure, \$1,673, above the mean of \$1,224.
3. Completed 90% of referred CORE Evaluations, above the mean for group of 73%.
4. Degree of change rating = 70, two points below the mean of 72.

Item Analysis: a. Prior to 9/74, Longmeadow lacked prototype "f."

b. Prior to 9/74, parental participation rated as 20% or less.

c. Prior to 9/74, all components of CORE Evaluation were routine with the exception of "b."

d. "Mainstreaming" represented a moderate change to Longmeadow.

5. No prior change reported other than associated with the implementation of Chapter 766. Longmeadow began to incorporate the anticipated mandates of Chapter 766 a full year before the implementation date of 9/74.
6. 766 change leadership came from administration and special services staff. Initial training provided to special services staff who were then used to train regular staff.
7. Workshops and monthly meetings with each school principal were used as vehicles to implement Chapter 766. These were originated by Director and Assistant Director of Pupil Services.
8. Needs assessment information was collected by Pupil Services staff.

SCHOOL DISTRICT

LUDLOW

1.	School Population	Number 4,229	Category Medium
2.	SPED Population	Number 442	Percentage 10.45%
3.	Per-Pupil Expenditure (Special Education)	Amount \$971	Category Medium
4.	CET Completion	Number 181	Percentage 96%
5.	766 Change Indicator	Number 71	
6.	Change/Innovation History	Reported None	
7.	766 Change Leadership	Substantial	SPED Administrator
		Moderate	Superintendent Principals
		Minimum	School Committee Teachers Consultants
8.	766 Change Method	Method	Workshops - Regular Teachers In-service - SPED Teachers
		Targets	Teachers
		Follow-Up	No
9.	Needs Assessment	Sources	SPED Administrator

LUDLOW

1. "Medium" population district with 10.45% of the population identified as "special needs," above the mean score of the group, 8.74%.
2. "Medium" special education per-pupil expenditure, \$971, below the mean of \$1,224, for the group.
3. Completed 96% of referred CORE Evaluations, well above the mean of 73%.
4. Degree of change rating = 71, almost exactly the mean score for the group, 72.

Item Analysis: a. Prior to 9/74, Ludlow lacked prototypes "e," "f," and "g."

b. Prior to 9/74, parental participation rated as 20% or less.

c. Prior to 9/74, all components of CORE Evaluation routine with the exception of "d."

d. "Mainstreaming" represented a little change to Ludlow.

5. No prior change involvement other than that required under Chapter 766 reported.
6. 766 change leadership was primarily responsibility of the SPED Administrator. Change efforts were directed initially toward teachers. No follow-up use of teachers was reported.
7. Workshops were provided for regular teachers, and in-service training was provided for special education teachers.
8. Director of Special Education responsible for needs assessment information.

SCHOOL DISTRICT

MINNECHAUG REGIONAL

1. School Population	Number 1,680	Category Low
2. SPED Population	Number 55	Percentage 3.25%
3. Per-Pupil Expenditure (Special Education)	Amount \$2,105	Category High
4. CET Completion	Number 12	Percentage 36%
5. 766 Change Indicator	Number 73	
6. Change/Innovation History	Reported Independent Study Experimental Curriculum Open Campus New Vocational Offerings	
7. 766 Change Leadership	Substantial SPED Administrator Principals SPED Teachers Moderate Consultants Minimum School Committee Superintendent and Asst. Teachers	
8. 766 Change Method	Method	Workshops; In-service; Release Time; Consultants
	Targets	SPED Staff
	Follow-Up	Yes - In-service for regular staff Principals
9. Needs Assessment	Sources System Analysis - SPED Director	

MINNECHAUG REGIONAL

1. "Low" population district with 3.25% of the population identified as "special needs," well below the mean score of 8.74%. Minnechaug Regional represents a secondary school population only.
2. "High" special education per-pupil expenditure, \$2,105, above mean for the group of \$1,224.
3. Completed 36% of referred CORE Evaluations, well below the mean for the group of 73%.
4. Degree of change rating = 73, one point above the mean of 72.
Item Analysis:
 - a. Prior to 9/74, Minnechaug lacked prototypes "e" and "f."
 - b. Prior to 9/74, parental participation rated as 20% or less.
 - c. Prior to 9/74, all components of CORE Evaluation were routine.
 - d. "Mainstreaming" represented a moderate change to Minnechaug.
5. Prior change history and experience was wide and varied. Open campus, independent study programs, experimental curriculum and expanded vocational offerings were among those educational changes reported. All educational changes were initiated by administration.
6. 766 change leadership came from administration and special class teachers. The special class teachers were used for in-service programs for regular staff and principals.
7. Workshops, in-service training, release time, and the use of consultants were methods of implementing Chapter 766.
8. SPED Administrator responsible for needs assessment data collection.

SCHOOL DISTRICT

MONSON

1.	School Population	Number 1,567	Category Low
2.	SPED Population	Number 113	Percentage 7.21%
3.	Per-Pupil Expenditure (Special Education)	Amount \$1,786	Category High
4.	CET Completion	Number 96	Percentage 76%
5.	766 Change Indicator	Number 66	
6.	Change/Innovation History	Reported Title I Speech Services	
7.	766 Change Leadership	Substantial Moderate Minimum	SPED Administrator Superintendent Consultants School Committee Principals Teachers
8.	766 Change Method	Method Workshops; In-service; Publications; Staff meetings; Night school for community Targets Teachers Follow-Up Yes - to Parents	
9.	Needs Assessment	Sources SPED Administrator	

MONSON

1. "Low" population district with 7.21% of the population identified as "special needs," below the mean score of the group, 8.74%.
2. "High" special education per-pupil expenditure, \$1,786, well above mean of \$1,224.
3. Completed 76% of referred CORE Evaluations, above mean for group of 73%.
4. Degree of Change rating = 66, six points below the mean for the group of 72.

Item Analysis: a. Prior to 9/74, Monson lacked prototypes "e" and "f."

b. Prior to 9/74, parental participation rated 20% or less.

c. Prior to 9/74, all components of CORE Evaluation routine with the exception of "b."

d. "Mainstreaming" represented a moderate change to Monson.

5. Prior change involvement in Monson was reported as involving the initiation of Title I services and the addition of speech therapy, both under the direction of administration.
6. 766 change leadership primarily from the SPED Administrator who provided training to teachers and then the teachers were used in outreach efforts to parents.
7. Workshops, in-service training, pamphlets, staff meetings and courses in the evening school were methods employed to facilitate the implementation of Chapter 766. The SPED Administrator had responsibility for the total implementation effort.
8. SPED Administrator gathered needs assessment information input from principals, teachers, superintendent, and analysis of referrals for special needs services.

SCHOOL DISTRICT

NORTHAMPTON

1.	School Population	Number 4,633	Category Medium
2	SPED Population	Number 582	Percentage 12.56%
3.	Per-Pupil Expenditure (Special Education)	Amount \$687	Category Low
4.	CET Completion	Number 461	Percentage 71%
5.	766 Change Indicator	Number 66	
6.	Change/Innovation History	Reported Utilization of Objectives in Education	
7.	766 Change Leadership	Substantial	School Committee SPED Administrator
		Moderate	Superintendent Principals
		Minimum	Asst. Superintendent Teachers, Consultants
8.	766 Change Method	Method Workshops; Newsletters; Team Leaders	
		Targets Teachers Principals	
		Follow-Up Yes - Peer Teaching Parents	
9.	Needs Assessment	Sources Review of Educational Plans Teacher Recommendations SPED Staff Recommendations	

NORTHAMPTON

1. "Medium" population district with 12.56% of the population identified as "special needs," above the mean score of the group, 8.74%.
2. "Low" special education per-pupil expenditure, \$687, well below the mean of \$1,224.
3. Completed 71% of referred CORE Evaluations, two points below the mean for the group, 73%.
4. Degree of change rating = 66, six points below the mean of 72.

Item Analysis:

- a. Prior to 9/74, Northampton lacked prototypes "e" and "f."
- b. Prior to 9/74, parental participation rated 20% or less.
- c. Prior to 9/74, all components of CORE Evaluation were routine with exception of "b."
- d. "Mainstreaming" represented a moderate change to Northampton.

5. Prior change history involved the introduction of educational objectives in teaching, all under administrative direction.
6. 766 change leadership was primarily responsibility of SPED Administrator and school committee. Teachers and principals were primary targets of implementation efforts and then they were used in "peer" teaching.
7. Workshops, newsletters and the training of team leaders were the methods employed to implement Chapter 766.
8. SPED Administrator compiled needs assessment information from review of educational plans, teacher input and the recommendation of the special education staff.

SCHOOL DISTRICT

PALMER

1.	School Population	Number 2,535	Category Medium
2.	SPED Population	Number 195	Percentage 7.69%
3.	Per-Pupil Expenditure (Special Education)	Amount \$641	Category Low
4.	CET Completion	Number 96	Percentage 96%
5.	766 Change Indicator	Number 70	
6.	Change/Innovation History	Reported Reading Curriculum Science Curriculum	
7.	766 Change Leadership	Substantial SPED Administrator Moderate Resource Staff Minimum School Committee Teachers; Superintendent Principals; Consultants	
8.	766 Change Method	Method Workshops - Formal Informal Targets Teachers Parents Follow-Up No	
9.	Needs Assessment	Sources No Data Available	

PALMER

1. "Medium" population district with 7.69% of the population identified as "special needs," below the mean score of the group, 8.74%.
2. "Low" special education per-pupil expenditure, \$641, well below the mean of \$1,224.
3. Completed 96% of referred CORE Evaluations, well above the mean for the group of 73%.
4. Degree of Change rating = 70, two points below the mean of 72.

Item Analysis: a. Prior to 9/74, Palmer lacked prototype "f."

b. Prior to 9/74, parental participation rated 20-50%.

c. Prior to 9/74, two of the four mandated components of a CORE Evaluation were not routine, "b" and "d."

d. "Mainstreaming" represented a moderate change to Palmer.

5. Prior change history involved revision of reading and science curriculums, and these were accomplished under the direction of curriculum committees.
6. 766 change leadership was primarily responsibility of SPED Administrator with assistance from the resource staff. Teachers and parents were the initial targets of change efforts. They were not used in any planned way for further implementation efforts.
7. Formal and informal workshops were the primary methods of implementing Chapter 766, under the direction of the SPED Administrator.
8. Needs assessment information not collected in any formal manner.

SCHOOL DISTRICT

SHELBURNE FALLS (REGIONAL)

1.	School Population	Number 2,300	Category Low
2.	SPED Population	Number 263	Percentage 11.43%
3.	Per-Pupil Expenditure (Special Education)	Amount \$600	Category Low
4.	CET Completion	Number 141	Percentage 69%
5.	766 Change Indicator	Number No Data Available	
6.	Change/Innovation History	Reported	
7.	766 Change Leadership	Substantial Moderate Minimum	
8.	766 Change Method	Method Targets Follow-Up	
9.	Needs Assessment	Sources	

SHELBURNE FALLS

1. "Low" population district with 11.43% of the population identified as "special needs," above mean of 8.74% for group. Shelburne Falls represents a regional school district made up of several small communities.
2. "Low" special education per-pupil expenditure, \$600, well below mean of \$1,224.
3. Completed 69% of referred CORE Evaluations, below the mean for the group of 73%.
4. No data available.
5. No data available.
6. No data available.
7. No data available.
8. No data available.

SCHOOL DISTRICT

SOUTH HADLEY

1.	School Population	Number 3,452	Category Medium
2.	SPED Population	Number 510	Percentage 14.77%
3.	Per-Pupil Expenditure (Special Education)	Amount \$531	Category Low
4.	CET Completion	Number 323	Percentage 85%
5.	766 Change Indicator	Number 80	
6.	Change/Innovation History	Reported Cluster Program - Jr. High Distributive Education	
7.	766 Change Leadership	Substantial Moderate Minimum	SPED Administrator Principals Superintendent Teachers School Committee Asst. Superintendent
8.	766 Change Method	Method Targets Follow-Up	Workshops Teacher Consultants Principals In-Service Teachers Yes Parents
9.	Needs Assessment	Sources SPED Administrator	

SOUTH HADLEY

1. "Medium" population district with 14.77% of the population identified as "special needs," well above the mean score of the group, 8.74%.
2. "Low" special education per-pupil expenditure, \$531, well below mean of \$1,224.
3. Completed 85% of referred CORE Evaluations, above mean for group of 73%.
4. Degree of change rating = 80, eight points above the mean of 72.

Item Analysis: a. Prior to 9/74, South Hadley lacked prototype "a."

b. Prior to 9/74, parental participation rated 50-80%.

c. Prior to 9/74, all components of CORE Evaluation were routine with the exception of "d."

d. "Mainstreaming" represented a moderate change to South Hadley.

5. Prior experience with education change involved the implementation of "cluster" programs at intermediate school level and the development of distributive education program at the high school. Both of the educational changes were initiated by the administration but also include parental involvement, it was reported.
6. 766 change leadership was from the SPED Administrator and the school principals. Initial efforts were directed to teachers who then were used for parent information programs.
7. Workshops, teacher consultations and in-service training were the methods of implementation reported.
8. The SPED administrator was responsible for the collection of needs assessment information.

SCHOOL DISTRICT

SOUTHWICK

1.	School Population	Number 2,100	Category Low
2.	SPED Population	Number 113	Percentage 5.38%
3.	Per-Pupil Expenditure (Special Education)	Amount \$906	Category Medium
4.	CET Completion	Number 35	Percentage 71%
5.	766 Change Indicator	Number 66	
6.	Change/Innovation History	Reported Grades 3 & 4 Interest Courses New Reading System	
7.	766 Change Leadership	Substantial Superintendent SPED Administrator Moderate Minimum	
8.	766 Change Method	Method Staff Meetings; Town Meeting; In-Service; Informal In- Service Targets Teachers Principals Follow-Up No Parents	
9.	Needs Assessment	Sources Test Scores Teacher Referrals Census	

SOUTHWICK

1. "Low" population district with 5.38% of the population identified as "special needs," below the mean score of 8.74% for the sample group.
2. "Medium" special education per-pupil expenditure, \$806, below the mean of \$1,224.
3. Completed 71% of referred CORE Evaluations, just below mean for group of 73%.
4. Degree of change rating = 66, six points below mean of 72.
Item Analysis:
 - a. Prior to 9/74, Southwick lacked proto-types "e" and "f."
 - b. Prior to 9/74, parental participation rated 20% or less.
 - c. Prior to 9/74, all components of CORE Evaluation were routine with the exception of "d."
 - d. "Mainstreaming" represented a moderate change to Southwick.
5. Prior involvement with educational change was reported as the introduction of grades 3 and 4 interest courses; i.e., woodworking, doll making, and a new reading system. All were initiated and implemented by administration.
6. 766 change leadership was shared by superintendent and SPED Administrator. Initial efforts were directed toward teachers and principals and no follow-up use was reported.
7. Staff meetings, formal in-service training and informal in-service training and the Town Meeting were methods used to implement Chapter 766. The superintendent and SPED Administrator were responsible for the implementation efforts.
8. Needs assessment data collected by SPED Administrator from test scores, teacher referrals and the census.

SCHOOL DISTRICT

SPRINGFIELD

1.	School Population	Number 28,505	Category High
2.	SPED Population	Number 1,008	Percentage 3.53%
3.	Per-Pupil Expenditure (Special Education)	Amount \$456	Category Low
4.	CET Completion	Number 846	Percentage 40%
5.	766 Change Indicator	Number 100	
6.	Change/Innovation History	Reported Open Classroom	
7.	766 Change Leadership	Substantial	School Committee; Superintendent; Asst. Superintendent; SPED Administrator; Consultants
		Moderate	Teachers
		Minimum	Principals
8.	766 Change Method	Method	In-Service
		Targets	SPED Staff
		Follow-Up	Yes - Workshops Regular Teachers Principals
9.	Needs Assessment	Sources SPED Administrator Supervisors	

SPRINGFIELD

1. "High" population district with 3.53% or the population identified as "special needs," well below the mean score of the group, 8.74. Springfield represents the largest population school district in the sample.
2. "Low" special education per-pupil expenditure, \$456, well below the mean of \$1,224.
3. Completed 40% of referred CORE Evaluations below the mean of 73% for the group.
4. Degree of change rating = 100, twenty-eight points above the mean score of 72, and the highest rating in the sample.

Item Analysis: a. Prior to 9/74, Springfield lacked prototype "f."

b. Prior to 9/74, parental participation rated as 50-80%.

c. Prior to 9/74, all components of CORE Evaluation were routine.

d. "Mainstreaming" represented little change to Springfield.

5. Prior involvement with educational change was reported as introduction of the open classroom in the elementary school, the responsibility of administrative staff.
6. 766 change leadership was substantially administrative, school committee, superintendent, assistant superintendent, SPED Administrator and consultants. The special education staff were the primary targets of implementation efforts, and they were used in workshops for regular staff personnel.
7. In-service training was the primary method of implementation of Chapter 766.
8. SPED Administrator responsible for collection of Needs assessment information with assistance from supervisors of special services.

SCHOOL DISTRICT

WARE

1. School Population	Number 1,675	Category Low
2. SPED Population	Number 252	Percentage 15.04%
3. Per-Pupil Expenditure (Special Education)	Amount \$932	Category Medium
4. CET COMPLETION	Number 85	Percentage 61%
5. 766 Change Indicator	Number 90	
6. Change/Innovation History	Reported Apprentice Program Work-Study Program Alternative Learning Program	
7. 766 Change Leadership	Substantial Moderate Minimum	SPED Administrator School Committee; Superintendent; Principals; Teachers; Regional Office Consultants
8. 766 Change Method	Method	In-Service Training Publications; Media Open Forum
	Targets	Parents; Teachers; Administrators
	Follow-Up	
	Yes. Parents - Ran Open Forums Teachers - Ran In-Service	
9. Needs Assessment	Sources Teachers Principals SPED Staff	

WARE

1. "Low" population district with 15.04% of the population identified as "special needs," well above the mean of 8.74%.
 2. "Medium" special education per-pupil expenditure, \$932, below the mean of the group, \$1,224.
 3. Completed 61% of referred CORE Evaluations, below the mean of 73%.
 4. Degree of change rating = 90, eighteen points above the mean of 72.
- Item Analysis:
- a. Prior to 9/74, Ware provided all seven prototypes.
 - b. Prior to 9/74, parental participation rated 20-50%.
 - c. Prior to 9/74, all components of CORE Evaluation were routine with the exception of "b."
 - d. "Mainstreaming" represented little change to Ware.
5. Prior involvement with educational change included the implementation of apprentice programs, work-study programs and alternative learning programs. These were under the supervision of administrators.
 6. 766 change leadership was primarily responsibility of SPED Administrator. Initial targets of implementation efforts were parents, teachers and administrators. Parents were used to train other parents, and teachers ran in-service programs.
 7. In-service training, publications, use of media and open forums were vehicles of 766 implementation efforts. All methods of 766 implementation under SPED Administrator's direction.
 8. Needs assessment gathered as result of information provided by teachers, principals, and special services staff under direction of SPED Administrator.

SCHOOL DISTRICT

WESTFIELD

1. School Population	Number 7,302	Category High
2. SPED Population	Number 508	Percentage 6.95%
3. Per-Pupil Expenditure (Special Education)	Amount \$881	Category Medium
4. CET Completion	Number 154	Percentage 84%
5. 766 Change Indicator	Number 66	
6. Change/Innovation History	Reported Reading Curriculum Math Curriculum Science Curriculum	
7. 766 Change Leadership	Substantial Superintendent SPED Administrator Moderate School Committee Asst. Superintendent Principals Minimum Teachers Consultants	
8. 766 Change Method	Method Workshops; In-Service; Institutes; College Offerings Targets Teachers; Principals; SPED Teachers; Parents Follow-Up Yes - In-Building General Public	
9. Needs Assessment	Sources In-system Evaluation Questionnaire Parent Advisory Council Input Regional Office Suggestions Mass. Advocacy Suggestions	

WESTFIELD

1. "High" population district with 6.95% of the population identified as "special needs," below the mean score of the group, 8.74%.
2. "Medium" special education per-pupil expenditure, \$881, below mean of \$1,224.
3. Completed 84% of referred CORE Evaluations, above mean for group of 73%.
4. Degree of change rating = 66, six points below the mean of 72.
Item Analysis:
 - a. Prior to 9/74, Westfield lacked prototypes "b" and "c."
 - b. Prior to 9/74, parental participation rated 20-50%.
 - c. Prior to 9/74, CORE Evaluation components were routine with exception of "a" and "c."
 - d. "Mainstreaming" represented a moderate change to Westfield.
5. Prior change history in Westfield was reported as related to the implementation of new curriculums in reading, math and science. The changes reported were under the direction of the superintendent and the appropriate curriculum director.
6. 766 change leadership was shared by the superintendent and the SPED Administrator. Initial implementation efforts were directed toward teachers, principals and parents, with use made of the initially trained personnel in buildings and in the community.
7. Workshops, inservice training, institutes and college course offerings were methods employed for the change effort. These were under the direction of the SPED Administrator.
8. Needs assessment information was compiled by an in-system evaluation and questionnaire, parent advisory input, regional office suggestions and the report of the Massachusetts Advocacy Study.

SCHOOL DISTRICT

WEST SPRINGFIELD

1.	School Population	Number 5,346	Category High
2.	SPED Population	Number 236	Percentage 4.41%
3.	Per-Pupil Expenditure (Special Education)	Amount \$2,567	Category High
4.	CET Completion	Number 182	Percentage 98%
5.	766 Change Indicator	Number 72	
6.	Change/Innovation History	Reported None Reported	
7.	766 Change Leadership	Substantial	School Committee Superintendent SPED Administrator
		Moderate	Principals Teachers Consultants
		Minimum	
8.	766 Change Method	Method	In-Service Training Workshops
		Targets	Teachers
		Follow-Up	No Principals
9.	Needs Assessment	Sources CET Recommendations SPED Administrator	

WEST SPRINGFIELD

1. "High" population district with 4.41% of the population identified as "special needs," well below the mean score of 8.74% for the group.
2. "High" special education per-pupil expenditure, \$2,567, well above the mean of \$1,224.
3. Completed 98% of referred CORE Evaluations, well above the mean of 73% for the group.
4. Degree of change rating = 72, the exact mean for the group.

Item Analysis: a. Prior to 9/74, West Springfield provided all seven prototypes.

b. Prior to 9/74, parental participation rated at 20% or less.

c. Prior to 9/74, all components of CORE Evaluation were routine.

d. "Mainstreaming" represented a substantial change for West Springfield.

5. No prior change involvement reported.
6. 766 change leadership was administrative, school committee superintendent and SPED Administrator. The initial targets of implementation efforts were teachers, and no follow-up use was reported.
7. In-service training and workshops were the methods employed to implement Chapter 766, and were the responsibility of the SPED Administrator.
8. The SPED Administrator was responsible for data collection and used primarily the results of CORE Evaluation recommendations in needs assessment.

SCHOOL DISTRICT

WILBRAHAM

1. School Population	Number 2,602	Category Medium
2. SPED Population	Number 164	Percentage 6.30%
3. Per-Pupil Expenditure (Special Education)	Amount \$1,707	Category High
4. CET Completion	Number 49	Percentage 33%
5. 766 Change Indicator	Number 80	
6. Change/Innovation History	Reported Cluster - Jr. High Pupils Open Classroom - Elementary Team Teaching Transitional 4,5,6 Outward Bound - Junior High ITA Reading	
7. 766 Change Leadership	Substantial Superintendent Asst. Superintendent SPED Administrator Moderate School Committee Principals; Teachers Consultants Minimum	
8. 766 Change Method	Method In-Service; Regional Work Shops; College Courses to Staff Targets Pupil Services Staff Follow-Up Yes - Workshops SPED Teachers Parents	
9. Needs Assessment	Sources SPED Staff CET Recommendations Parental Requests SPED Administrator	

WILBRAHAM

1. "Medium" population district with 6.30% of the population identified as "special needs," below the mean score of 8.74% for the group.
2. "High" special education per-pupil expenditure, \$1,707, above the mean of \$1,224.
3. Completed 33% of referred CORE Evaluations, well below the mean of 73% for the sample population.
4. Degree of change rating = 80, eight above the mean for the group of 72.

Item Analysis: a. Prior to 9/74, Wilbraham lacked prototypes "f" and "g."

b. Prior to 9/74, parental participation rated 20-50%.

c. Prior to 9/74, all components of CORE Evaluation were routine.

d. "Mainstreaming" represented a moderate change to Wilbraham.

5. Prior change involvement was reported as substantial with implementation of cluster programs at the junior high, open classrooms at the elementary level, team teaching in the transitional grades of 4, 5, and 6, an "Outward Bound" program at the junior high level and the ITA Reading Program. All of these innovations were cooperative efforts of the appropriate administrators and the staff.
6. 766 change leadership was administrative; superintendent, assistant superintendent and SPED Administrator. Initial targets were the pupil services staff and then they were used in workshops for special education teachers and parents.
7. In-service training, regional workshops and college courses were methods employed to implement Chapter 766 under the direction of the SPED Administrator.
8. Needs assessment information gathered by SPED Administrator through staff recommendations, parental requests and assessment of regular and special programs.

Following are complete tables of those five areas in which statistical data was collected: (a) School District Population, (b) Percentage of Special Needs, (c) Special Education Per-Pupil Expenditure, (d) Percentage of CORE Evaluations completed, and (e) Degree of Change Rating.

TABLE V

School Population	District
650	Hatfield
716	Hadley
1,003	Hampden
1,307	Belchertown
1,567	Monson
1,675	Ware
1,680	Minnechaug Regional
1,905	Amherst
2,100	Southwick
2,300	Shelburne Falls (Regional)
2,535	Palmer
2,602	Wilbraham
2,637	Easthampton
3,452	South Hadley
3,502	East Longmeadow
4,229	Ludlow
4,300	Longmeadow
4,633	Northampton
5,346	West Springfield
4,349	Agawam
7,301	Westfield
8,990	Holyoke
9,967	Chicopee
28,505	Springfield

TABLE VI
% OF "SPECIAL NEEDS" PUPILS IN SCHOOL POPULATION

<u>Percent</u>	<u>District</u>
3.25	Holyoke
3.25	Minnechaug Regional
3.53	Springfield
3.88	East Longmeadow
4.09	Easthampton
4.41	West Springfield
5.09	Longmeadow
5.38	Southwick
6.30	Wilbraham
6.84	Agawam
6.95	Westfield
7.21	Monson
7.69	Palmer
8.87	Belchertown
9.05	Chicopee
10.45	Ludlow
11.30	Hampden
11.43	Shelburne Falls (Regional)
12.56	Northampton
14.15	Hatfield
14.77	South Hadley
15.04	Ware
16.48	Hadley
17.79	Amherst

TABLE VII
SPECIAL EDUCATION PER-PUPIL EXPENDITURE

<u>Dollar Amount</u>	<u>District</u>
212	Hampden
423	Hatfield
456	Springfield
517	Hadley
531	South Hadley
600	Shelburne Falls (Regional)
641	Palmer
687	Northampton
733	Chicopee
806	Southwick
881	Westfield
932	Ware
971	Ludlow
1,009	Amherst
1,280	Agawam
1,436	Belchertown
1,673	Longmeadow
1,707	Wilbraham
1,728	Easthampton
1,786	Monson
2,105	Minnechaug Regional
2,235	East Longmeadow
2,567	West Springfield
3,460	Holyoke

TABLE VIII

% CORE EVALUATIONS COMPLETED DURING 1974-75 SCHOOL YEAR

<u>Percent</u>	<u>District</u>
33	Wilbraham
36	Minnechaug Regional
40	Springfield
42	Holyoke
53	Easthampton
61	Ware
69	Shelburne Falls (Regional)
71	Northampton
71	Southwick
76	Hadley
76	Monson
84	Chicopee
84	East Longmeadow
84	Westfield
85	South Hadley
90	Longmeadow
91	Belchertown
92	Hatfield
94	Agawam
96	Ludlow
96	Palmer
98	West Springfield

No Data Available: Amherst and Hampden

TABLE IX
766 CHANGE INDICATORS - RANKING

<u>Score</u>	<u>District</u>
54	Holyoke
62	East Longmeadow
63	Hatfield
64	Agawam
65	Hampden
66	Monson
66	Northampton
66	Southwick
66	Westfield
70	Palmer
70	Longmeadow
71	Ludlow
72	West Springfield
73	Minnechaug Regional
77	Hadley
80	South Hadley
80	Wilbraham
82	Chicopee
87	Amherst
90	Ware
100	Springfield

No Data: Belchertown
Easthampton
Shelburne Falls

C H A P T E R V

THE PROCESS OF EDUCATIONAL CHANGE: AN ANALYSIS

Introduction

The data is examined in this chapter with regard to a series of hypotheses relating to the process of educational change. Educational change, as stated earlier, is a complex process. In order to gain insight into that process, a variety of factors which affect and influence change implementation are examined to assess their degree of impact in the school districts' attempts to implement Chapter 766. Examination of the cited change variables in this study provides some insight and understanding with regard to educational change and as a result of that information, hopefully, new approaches to facilitate change implementation can be accomplished.

The introduction of change into an educational environment must be related to the characteristics of that environment as well as to the nature of the change itself. Strategies and methods of introduction, assimilation and adoption of educational change are chosen in light of the change target population. Chapter 766, the change dimension under study here, being state law, mandated total school district adoption. Each school district was expected to implement Chapter 766 on September 1, 1974. Faced with the prospect of total educational reform with regard to special education programming, each school district had to design a method of implementing Chapter 766 throughout their entire school system.

In the analysis of the characteristics and categories of variables which affect the implementation of Chapter 766 in the selected school districts, two basic classifications of those attributes are treated:

(1) Demographic factors and (2) Dimensions of the change process.

Hypotheses, presented in the "null" format, related to each of these classifications are weighed against data which permits a measure of the success of the implementation efforts, the percentage of CORE Evaluations completed. In this research study, seven school districts were identified as "most fully implemented" because they achieved a rating of 90% or greater with regard to their percentage of CORE Evaluations completed. Seven school districts in the sample fell below the 70th percentile with regard to the percentage of CORE Evaluations completed, and they have been identified as "least fully implemented." In the narrative analysis of the hypotheses researched in this study, comparisons of these two divergent groups of school systems are made.

The purpose of analyses are to determine the significance of variables in question with regard to the degree of implementation achieved. Thus, the extent of or absence of a variable in the two groups, "most fully implemented" and "least fully implemented," can provide indications of the significance of the particular variable with regard to the change process involved in implementing Chapter 766. An analysis, using the chi-square formula, includes the remaining school districts falling between 70% and 89% with regard to degree of implementation achieved (based on percentage of CORE Evaluations completed) as a third category in the computation. By using the "moderately implemented" districts' data, all reporting school districts are accounted for in the analysis. The two school districts, Amherst and Hampden, that did not provide data as to the percentage of CORE Evaluations completed, were assigned the "moderate" category, giving a potential of twenty-four data

responses for the chi-square analysis.

Each hypothesis will be presented and then followed by a discussion of data obtained. Results based upon the chi-square analyses are reported initially. Then a discussion of the significance of observations relating to the hypothesis is included.

Hypothesis I

There is no relationship between LEA enrollment and the degree of implementation of Chapter 766 achieved.

The school district population data collected was classified into three categories: (1) Low = those school districts with less than 2,500 reported school enrollment, (2) Medium = those school districts between 2,500 and 4,999 and (3) High = those school districts reporting school enrollment of 5,000 or more. The three categories of enrollment are represented in the columns of the chi-square table, while the degree of implementation ("least" fully implemented, "moderately" implemented, and "most" fully implemented) are represented in the rows of the table. The three by three table gives a nine (9) cell chi-square analysis. A computer analysis of the table results in a raw chi-square which is then checked against the standard chi-square table of significance. With a nine (9) cell chi-square table the degree of freedom on the table is four (4), and as stated earlier, the standard significance level of .05 must be achieved to reject the null hypothesis.

With four (4) degrees of freedom, the raw chi-square must reach 9.488 to reject the null hypothesis at the .05 level of significance. As can be observed, with regard to the relationship between enrollment

TABLE X

 DEGREE OF IMPLEMENTATION CHI-SQUARE
 ANALYSIS TABLE: LEA ENROLLMENT

	Count			Enrollment			Row Total
	Row Pct	Col Pct	Tot Pct	1. Low	2. Medium	3. High	
1. "least"			3		2	2	7
			42.9		28.6	28.6	29.2
			30.0		25.0	33.3	
			12.5		8.3	8.3	
2. "moderate"			5		3	2	10
			50.0		30.0	20.0	41.7
			50.0		37.5	33.3	
			20.8		12.5	8.3	
3. "most"			2		3	2	7
			28.6		42.9	28.6	29.2
			20.0		37.5	33.3	
			8.3		12.5	8.3	
column total			10		8	6	24
			41.7		33.3	25.0	100

Raw Chi-Square .90000

and the degree of implementation achieved, the chi-square analysis fails to reject the null hypothesis.

Regarding the implementation of Chapter 766, the size of the school population seems to have had little bearing on the ability of the districts to implement the law. Of the seven school districts rated as "most fully implemented," two were "low" population districts, three were "medium" population districts, and two were rated as "high" population districts. The distribution of populations among the "most fully implemented" systems represents a perfect scatter of populations.

Among the seven school districts classified as "least fully implemented," the population distribution closely duplicates those of the "most fully implemented," three "low" population districts, two "medium" population districts, and two "high" population districts. With the population factor distributed in such similar proportions in both categories of implemented school districts, the conclusion must be reached that the size of the school district had no relation to the ability of the school system to implement Chapter 766.

Hypothesis II

There is no relationship between the percentage of special needs population of the LEA and the degree of implementation achieved.

Beyond the total school population, the data collected also provides another dimension of the population statistics to evaluate with regard to its effect on Chapter 766's implementation. The 'special needs' population of the school district is a factor which may be more meaningful with regard to the implementation of Chapter 766, since Chapter 766 is change

TABLE XI

DEGREE OF IMPLEMENTATION CHI-SQUARE
ANALYSIS TABLE: PERCENTAGE OF SPECIAL NEEDS

	Count	% Special Needs			Row
	Row Pct				Total
	Col Pct	1. Low	2. Medium	3. High	
Tot Pct					
1.	4	1	2	7	
"least"	57.1	14.3	28.6	29.2	
	50.0	14.3	22.2		
	16.7	4.2	8.3		
2.	2	3	5	10	
"moderate"	20.0	30.0	50.0	41.7	
	25.0	42.9	55.6		
	8.3	12.5	20.8		
3.	2	3	2	7	
"most"	28.6	42.9	28.6	29.2	
	25.0	42.9	22.2		
	8.3	12.5	8.3		
column total	8	7	9	24	
	33.3	29.2	37.5	100.0	

Raw Chi-Square 3.46939

specifically related to programming of special education. In the analysis of the percentage of special needs populations for the chi-square computation, the percentages of special needs pupils in the LEA's populations were categorized as follows: (1) Low = 3.25%-5.38%, (2) Medium = 6.30%-9.05%, and (3) High = 10.45%-17.79%.

With four (4) degrees of freedom, the raw chi-square must reach 9.488 to reject the null hypothesis at the .05 level of significance. As can be observed, with regard to the effect of the percentage of special needs students in the school population on the degree of implementation achieved, the chi-square analysis fails to reject the null hypothesis.

Although the computed chi-square analysis fails to reject the hypothesis, there are some interesting observations to be made in the data analysis with regard to the percentage of special needs population. Five of the seven school districts in the "least fully implemented" category fall below the mean percentage of special needs students and four of these are below the lowest special needs percentage rating of the "most fully implemented" school districts.

It would appear that the percentage of special needs pupils is a more significant factor in the degree of implementation achieved than the statistical analysis shows. This may be due to the size of the sample population, and if the same data distribution were present in a larger sample, the chi-square analysis might yield more significance. It is interesting to note that four of the seven "least fully implemented" school districts had the lowest percentage of special needs pupils in the entire population researched. This finding may be related to the issue

of motivation regarding the implementation of Chapter 766. With a small percentage of pupils requiring "special education," those districts may not have invested as much effort in their implementation efforts. Large numbers of special needs pupils, however, did not correlate with the achievement of "most fully implemented" status, as the four districts with the highest percentage of special needs pupils did not achieve "most fully implemented" ranking.

Hence, it would appear that with regard to the incidence of pupils in the LEA population, either the total population or the percentage of special needs pupils, the population did not appear to influence the degree of implementation of Chapter 766 achieved in the research sample.

Hypothesis III

There is no relationship between the amount of money invested in special education by the LEA and the degree of implementation of Chapter 766 achieved.

Chapter 766 represents educational change directed at the programming of special education students. An indicator of the amount of money invested in the targets of this educational change may be seen in the per-pupil expenditure on special education pupils in each district. The per-pupil expenditures for special education services is computed by dividing the total special education budget by the number of "special needs" pupils serviced in the district. The per-pupil expenditures for special education were classified as follows: (1) Low = \$699 and below, (2) Medium = \$700-\$1599, and (3) High = \$1600 and above.

TABLE XII

DEGREE OF IMPLEMENTATION CHI-SQUARE
ANALYSIS TABLE: PER-PUPIL EXPENDITURE

	Count Row Pct Col Pct Tot Pct	Per-Pupil Expenditure			Row Total
		1. Low	2. Medium	3. High	
1. "least"		2	1	4	7
		28.6	14.3	57.1	29.2
		25.0	12.5	50.0	
		8.3	4.2	16.7	
2. "moderate"		4	4	2	10
		40.0	40.0	20.0	41.7
		50.0	50.0	25.0	
		16.7	16.7	8.3	
3. "most"		2	3	2	7
		28.6	42.9	28.6	29.2
		25.0	37.5	25.0	
		8.3	12.5	8.3	
column total		8 41.7	8 33.3	8 25.0	24 100

Raw Chi-Square 3.08571

With four (4) degrees of freedom the raw chi-square must reach 9.488 to reject the null hypothesis at the .05 level of significance. As can be observed, with regard to the effect of the per-pupil expenditure on the degree of implementation achieved, the computation of the chi-square fails to reject Hypothesis III.

Those school districts classified as "most fully implemented" had per-pupil expenditures that ranged from "low" to "high." The distribution of per-pupil expenditures among the seven "most fully implemented" school districts was two with "low" per-pupil expenditure, three with "medium" per-pupil expenditure, and two with "high" per-pupil expenditure.

The school districts rated as "least fully implemented" had per-pupil expenditures that ranged from "low" to "high" also. The distribution of per-pupil expenditures among the "least fully implemented" favors "high" per-pupil expenditure. The distribution includes two "low" per-pupil expenditure districts, one "medium" per-pupil expenditure district, and four "high" per-pupil expenditure districts. The implication of the incidence of high per-pupil expenditures among four of the least fully implemented school districts needs further investigation.

The conclusions that can be drawn from the analysis of the data on per-pupil expenditure and its relationship to the implementation of the educational change that Chapter 766 represents is that the amount of money invested on the targets of the educational change had little bearing on the achievement of the school districts' implementation of Chapter 766. Hence, Hypothesis III cannot be rejected.

Hypothesis IV

There is no relationship between the amount of change required to implement Chapter 766 and the degree of implementation achieved.

In this hypothesis, an attempt to determine the effect of the amount of movement from prior state to adoption state of educational change was measured with regard to the attainment of the change status. Logically, it would appear that the greater the distance from pre-adoption status to adoption, the more difficult it would be to achieve change implementation. In this study the school districts were assigned a "Chapter 766 Change Rating," that is, a numerical indicator of the prior state of the school district with regard to the mandates of Chapter 766. The "766 Change Indicators" were computed for each school district based on the responses on the survey instrument relating to those components of the Chapter 766 legislation which were in place in the school district prior to September, 1974. The numerical "indicator" is higher as the number of changes Chapter 766 required of the school district diminishes.

The "766 Change Indicators" were classified as follows: (1) Low = 66 and below, (2) Medium = 67-79, and (3) High = 80 and above.

With four (4) degrees of freedom the raw chi-square must reach 9.488 to reject the null hypothesis at the .05 level of significance. As can be observed, with regard to the effect of the amount of change required to implement Chapter 766 on the degree of implementation achieved, the computation of the chi-square fails to reject Hypothesis IV. With the attainment of a 7.20 chi-square, however, there appears to be a tendency toward significance with regard to the variable in question in Hypothesis

IV.

The "766 Change Indicators" for five of the seven "most fully implemented" school districts were below the mean for the total sample population, another system was at the mean, and one district did not provide data in this area. The distribution of "766 Change Indicators" among the "most fully implemented" school districts is as follows: 63, 64, 70, 70, 71, and 72.

Two of the "least fully implemented" school districts were unable to provide data on the prior state of their school districts with regard to the requirements of Chapter 766. The five of the seven districts rated "least fully implemented" who reported provide an interesting commentary on the hypothesis presented here. Of the five "least fully implemented" school districts, four were above the mean for prior status of readiness to implement Chapter 766. The five districts in the "least fully implemented" category were rated in the "766 Change Indicator" category as follows: 54, 73, 80, 90 and 100.

Since five of the six reporting "most fully implemented" districts were below the mean with regard to the prior state of the district pertaining to Chapter 766's requirements, and four of the five reporting "least fully implemented" were above the same mean, it would appear that in this study there is a tendency toward an inverse relationship between the prior status of the district and the ability of the district to implement Chapter 766. The "most fully implemented" districts in this study were significantly less prepared for the implementation of Chapter 766, while those districts rated as "least fully implemented" reported a greater degree of readiness to implement Chapter 766 as they had

TABLE XIII

DEGREE OF IMPLEMENTATION CHI-SQUARE ANALYSIS
TABLE: AMOUNT OF CHANGE REQUIRED

	Count Row Pct Col Pct Tot Pct	766 Change Indicator			Row Total
		1. Low	2. Medium	3. High	
1. "least"		3	1	3	7
		42.9	14.3	42.9	29.2
		25.0	16.7	50.0	
		12.5	4.2	12.5	
2. "moderate"		6	1	3	10
		60.0	10.0	30.0	41.7
		50.0	16.7	50.0	
		25.0	4.2	12.5	
3. "most"		3	4	0	7
		42.9	57.1	0	29.2
		25.0	66.7	0	
		12.5	16.7		
column total		12	6	6	24
		50.0	25.0	25.0	100.0
Raw Chi-Square 7.20000					

practiced a greater number of Chapter 766 required procedures prior to the 1974-75 school year.

In conclusion, the degree of change required to implement an educational innovation does appear to have a bearing on the achievement of that implementation in this study. Although the chi-square analysis fails to reject the null hypothesis, a strong tendency is observed in the fact that those districts "less fully implemented" at the conclusion of the 1974-75 school year were, in general, more fully prepared to implement Chapter 766 prior to the beginning of that school year than those districts who achieved a rating of "most fully implemented." A supposition that should be studied in the future as a result of the findings here is the question of motivation to achieve implementation of the educational change. It may be that the further the distance from adoption status the greater the effort to achieve adoption of the educational change or innovation.

Hypothesis V

There is no relationship between prior involvement with educational change or innovation and the degree of implementation of Chapter 766 achieved.

Prior involvement and experience with educational change was measured in this study by reports of educational innovation adopted within the past three years in each school district. The districts were then clustered to identify those districts "highly" involved with educational change: those districts who had adopted three or more innovations, those districts "moderately" involved with educational change, those systems with one or two recent change adoptions, and those districts

TABLE XIV

DEGREE OF IMPLEMENTATION CHI-SQUARE ANALYSIS
TABLE: PRIOR INVOLVEMENT WITH EDUCATIONAL CHANGE

	Count Row Pct Col Pct Tot Pct	Prior Change Involvement			Row Total
		1. Low	2. Medium	3. High	
1. "least"		2	0	3	5
		40.0	0	60.0	23.8
		20.0	0	60.0	
		9.5	0	14.3	
2. "moderate"		4	4	2	10
		40.0	40.0	20.0	47.6
		40.0	66.7	40.0	
		19.0	19.0	9.5	
3. "most"		4	2	0	6
		66.7	33.3	0	28.6
		40.0	33.3	0	
		19.0	9.5	0	
column total		10	6	5	21
		47.6	28.6	23.8	100.0

Raw Chi-Square 6.81333

"least" involved with educational change, those systems which reported no recent involvement with educational change.

With four (4) degrees of freedom, the raw chi-square must reach 9.488 to reject the null hypothesis at the .05 level of significance. As can be observed with regard to the effect of the prior involvement with educational change or innovation on the degree of implementation achieved, the computation of the chi-square analysis fails to reject Hypothesis V. The attainment of 6.8 raw chi-square, however, points out a tendency toward identifying some significance with regard to the variable in question.

Of the school districts designated as "most fully implemented," none of them appear rated as "high" with regard to prior involvement with educational change. Four of the "most fully implemented" districts are among those systems reported as having no recent involvement with educational change.

Three of the school districts identified as "least fully implemented" appear among those districts classified as "highly" involved with educational change. Two of these "least fully implemented" districts reported no prior involvement with innovation or change, and two did not provide data in this area.

Prior involvement with educational change did not provide any advantage to those systems attempting to implement Chapter 766 according to the findings in this study. This conclusion might be further evaluated in terms of the type of educational change Chapter 766 represents. Those school systems with "high" prior involvement with educational change had chosen to involve themselves with the changes they adopted in the past,

and thus made a commitment at some level to the change itself. Chapter 766 was mandated by legislation, thus school districts did not have an option with regard to its implementation.

Another variable in the question of the relationship of prior involvement with educational change and the ability of the school district to implement change involves the scope of the change or innovation. Chapter 766 in its mandate represents change which impacts on the total school system where the vast majority of the prior educational changes reported in this research involved segments (i.e., grade levels, vocational options, specific curriculum) of the school system rather than total school system practice change.

Hypothesis VI

There is no relationship between LEA leadership patterns and the degree of implementation of Chapter 766 achieved.

In order that a chi-square analysis of the data on leadership patterns within the school districts, with regard to the implementation of Chapter 766, the following classifications of leadership sources was established: (1) = leadership by the SPED Administrator alone, (2) = leadership shared by SPED Administrator and other administrative personnel, and (3) = leadership shared by system administrative staff and "others"; i.e., teachers, parents, counselors, or consultants.

With four (4) degrees of freedom the raw chi-square must reach 9.488 to reject the null hypothesis at the .05 level of significance. As can be observed with regard to the effect of the leadership patterns on the degree of implementation of Chapter 766 achieved, the computation of the chi-square analysis fails to reject the null Hypothesis VI.

TABLE XV

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DEGREE OF IMPLEMENTATION CHI-SQUARE ANALYSIS
TABLE: LEADERSHIP PATTERNS

	Count		Leadership Patterns			Row Total
	Row Pct	Col Pct	SPED 1. Alone	SPED and 2. Other Adm.	Adms' & 3. Others	
Tot Pct						
1. "least"			1	2	2	5
			20.0	40.0	40.0	23.8
			20.0	16.7	50.0	
			4.8	9.5	9.5	
2. "moderate"			1	8	1	10
			10.0	80.0	10.0	47.6
			20.0	66.7	25.0	
			4.8	38.1	4.8	
3. "most"			3	2	1	6
			50.0	33.3	16.7	28.6
			60.0	16.7	25.0	
			14.3	9.5	4.8	
column total			5	12	4	21
			23.8	57.1	19.0	100.0

Raw Chi-Square 5.92667

Leadership for implementing Chapter 766 among the school districts in the sample showed only slight variety. The school districts used administrative personnel in leading the implementation of Chapter 766 for the most part. More than one half of the districts reporting in this area (12) reported that some combination of administrative personnel were most substantially involved in leading the district's efforts to implement Chapter 766. SPED Administrators and superintendents were the most common combinations reported.

Five school districts reported that the SPED Administrators alone have had the substantial responsibility for implementing Chapter 766. The remaining four school districts responding to this item reported substantial leadership for implementation of Chapter 766 rested with administrative personnel and "others." The SPED Administrators were involved in leading Chapter 766 implementation in all districts reporting.

Of the school districts classified as "most fully implemented" three reported that the SPED Administrator alone had the major leadership role in regard to Chapter 766. Two of the "most fully implemented" districts reported that the SPED Administrator and other administrative personnel (i.e., superintendent, principals) had primary responsibility for implementing Chapter 766. One of the "most fully implemented" school districts reported that the administrative staff shared responsibility for leading Chapter 766 implementation with "others," specifically, members of the special services department who were deployed throughout the school system.

Among the school districts rated "least fully implemented" two indicated that administrative personnel were assisted by "others" in

assuming responsibility for Chapter 766's implementation. Two other districts in the "least fully implemented" category identified administrators as responsible while one stated that the SPED Administrator alone had primary responsibility for the change efforts.

Without exception, it was documented that change implementation, with regard to Chapter 766, was an administrative responsibility. Administrators figured most prominently in responses to the question of change leadership in other areas as well. It would appear to be a relatively safe assumption, with regard to the responses on the survey, that while changes may originate from a variety of sources, i.e., legislation, parents, staff, administrators most often function in leadership roles when the implementation of the change occurs.

With regard to Hypothesis VI, there does not appear to be any evidence that change leadership has any bearing on the achievement of change implementation in this study. The sources of leadership may have made an impact on the quality of the change implementation, but exhaustive evaluations and longitudinal studies will be necessary to determine the validity of that premise.

Hypothesis VII

There is no relationship between the effort invested to identify and utilize optimum methods to implement the Chapter 766 law and the degree of implementation achieved.

The survey in this research effort directed two specific inquiries at the hypothesis stated here. One question asked systems to identify those methods "considered" and another asked to report on those methods

"chosen and used" as strategies to facilitate Chapter 766's implementation. Unilaterally, the districts responded to both questions identically; those methods considered were those methods utilized.

With few exceptions, three to be specific, all systems responded with a variation of "workshops" or "in-service training," or combinations of both, as their strategies to facilitate implementation of Chapter 766. The three systems reporting a degree of innovation in their implementation efforts are not among those districts rated as "most fully implemented" and therefore offer little support to reject Hypothesis VII.

The data collected with regard to Hypothesis VII did not provide enough variation to warrant, or make possible, the computation of a chi-square analysis. The information regarding the consideration and selection of change strategies is inconclusive with respect to its effect on the achievement of Chapter 766's implementation. Further, specific delineation of the "workshops" and "in-service training" responses may reveal more fully the import of the selection of implementation strategies.

One generalization that can be made on the basis of the research collected in this survey on the change strategies considered and employed, is that school districts generally lacked innovative or imaginative resources for developing strategies to facilitate the implementation of Chapter 766. The workshop format was used consistently and was geared primarily toward providing information and direction to the target audience. One conclusion that might be inferred from this particular aspect of the research effort is that there is a need for leadership in educational change diffusion in almost all of the districts in the population

sample.

Hypothesis VIII

There is no relationship between the acquisition of needs assessment information and the degree of implementation of Chapter 766 achieved.

In the survey, the districts were asked to identify the sources of their needs assessment data. A variety of responses resulted. As special education was the focus of Chapter 766 and this particular change effort, the SPED Administrators were identified as primarily responsible for the acquisition of needs assessment information.

Ten of the school districts reported that the SPED Administrator collected needs assessment from the staff of the special services department. Three of those districts identified as "most fully implemented" are in this category. Six of the school districts reported a "comprehensive" needs assessment system involving all segments of the educational staff and community input. One district rated "most fully implemented" was among the six who did "comprehensive" needs assessments.

The two remaining "most fully implemented" districts are at opposite ends of the continuum. One reported needs assessment information was gathered from special services staff and teacher referrals, while the other reported they had not done a needs assessment.

The needs assessments of four of the "least fully implemented" districts were collected by SPED Administrators and special services staff. One of these "least fully implemented" districts reported a comprehensive needs assessment with data from throughout the educational

community. Two "least fully implemented" districts did not provide data on this issue.

In summary, the wide range of responses with regard to the collection of needs assessment information did not lend itself to the application of the chi-square analysis, and further, with no clear cut evidence to the contrary, the data supports Hypothesis VIII.

Hypothesis IX

There is no relationship between the degree to which early adopters of educational change are utilized to influence laggards and the degree of implementation of Chapter 766 achieved.

For purposes of this research, the survey questioned the use of those individuals who were the initial targets of change efforts in the diffusion of Chapter 766 to others. Two categories were identified for use in the chi-square analysis: (1) = Yes, early adopters were used in the training of others, (2) = No, those initially trained were not used in any planned way to facilitate the training of others.

With two (2) degrees of freedom, the raw chi-square must reach 5.991 to reject the null hypothesis at the .05 level of significance. As can be observed, with regard to the effect of the use of early adopters in subsequent training efforts on the achievement of the implementation of Chapter 766, the chi-square analysis fails to reject the null hypothesis.

Thirteen of the twenty-one school districts responding on this issue reported that those who were first trained with regard to Chapter 766 were then used to train others. Basically, most districts geared training efforts to special education personnel initially. Subsequently the

TABLE XVI

DEGREE OF IMPLEMENTATION CHI-SQUARE ANALYSIS
TABLE: EARLY ADOPTERS USE IN SUBSEQUENT TRAINING

	Count			
	Row Pct			Row
	Col Pct			Total
	Tot Pct	1. Yes	2. No	
1. "least"		4	1	5
		80.0	20.0	23.8
		30.8	12.5	
		19.0	4.8	
2. "moderate"		6	4	10
		60.0	40.0	47.6
		46.2	50.0	
		28.6	19.0	
3. "most"		3	3	6
		50.0	50.0	28.6
		23.1	37.5	
		14.3	14.3	
column total		13	8	21
		61.9	38.1	100.0

Raw Chi-Square 1.07019

personnel initially trained were used to diffuse their information to regular classroom teachers or parents. Of the seven "most fully implemented" school districts, three used "early adopters" in future training efforts, three did not, and one did not respond.

With regard to the "least fully implemented" districts, four made use of "early adopters" in subsequent training efforts, one did not, and two did not respond. One issue in this particular hypothesis is the question of choice in adopting the change practice. Chapter 766, being legislated, did not provide the option of "adopting" the change or not. This fact diminishes the probable impact of using early adopters to influence the laggards, as those initially trained were not choosing the innovation but were mandated to implement the change practices.

It is interesting to note, that at better than a two-to-one ratio, school systems chose to use those initially trained to facilitate the training of others.

Following is a recap of the nine hypotheses and the results of the data analysis concerning each:

Hypothesis I

There is no relationship between LEA enrollment and the degree of implementation of Chapter 766 achieved.

Data failed to reject

Hypothesis II

There is no relationship between the percentage of special needs population of the LEA and the degree of implementation of Chapter 766 achieved.

Data failed to reject

Hypothesis III

There is no relationship between the amount of money invested in special

Data failed to reject

education by the LEA and the degree of implementation of Chapter 766 achieved.

Hypothesis IV

There is no relationship between the amount of change required to implement Chapter 766 and the degree of implementation achieved.

Data failed to reject

Hypothesis V

There is no relationship between prior involvement with educational change or innovation and the degree of implementation of Chapter 766 achieved.

Data failed to reject

Hypothesis VI

There is no relationship between LEA leadership patterns and the degree of implementation of Chapter 766 achieved.

Data failed to reject

Hypothesis VII

There is no relationship between the effort invested to identify and utilize optimum methods to implement the Chapter 766 law and the degree of implementation of Chapter 766 achieved.

Data failed to reject

Hypothesis VIII

There is no relationship between the acquisition of needs assessment information and the degree of implementation of Chapter 766 achieved.

Data failed to reject

Hypothesis IX

There is no relationship between the degree to which early adopters of educational change are utilized to influence laggards and the degree of implementation of Chapter 766 achieved.

Data failed to reject

Summary

In summary, nine hypotheses have been examined with regard to the

implementation of educational change. Of the nine researched, three, through the chi-square statistical analysis, demonstrated tendencies toward significance at the established .05 level. Hypothesis IV, regarding the relationship between the amount of change required to implement Chapter 766, came statistically closest to rejecting the null hypothesis. The analysis of the direction of the rejection tendency is interesting in that it would appear that the school districts, rated as having to make the greatest changes to implement Chapter 766, generally achieved a higher degree of implementation in this study. With Chapter 766 being legislated educational change, a motivational factor to comply with the "law" may have influenced the change efforts in this situation.

Hypothesis V, which addresses the question of the relationship between prior involvement with educational change and innovation and its bearing on the achievement of implementation of Chapter 766, statistically shows a tendency toward rejecting the null hypothesis. Since none of the systems identified as "most fully implemented" were rated as having a "high" prior involvement with adopting educational change or innovation, prior change involvement did not provide an advantage in the implementation of Chapter 766.

The third hypothesis which statistically demonstrated some tendency toward rejection was Hypothesis VI where the relationship of leadership patterns and the achievement of implementation of Chapter 766 was examined. The data seemed to demonstrate that leadership was strongly a function of administration and, in many cases, regarded implementation of Chapter 766 a function of the SPED Administrator and significant other administrators.

Although none of the hypotheses presented in this research were rejected as a consequence of the data analyses, there are some important and significant perspectives on the change process in educational settings that surfaced. The following generalizations can be proposed as a result of the research conducted here and with regard to the school districts surveyed:

1. Most school districts reported change leadership as a function of administration.
2. Expenditures on the targets of change efforts appear not to affect the implementation of that change.
3. Innovative and/or research based change implementation strategies are not generally practiced by school districts.
4. Needs assessment information is generally not collected in a well defined systematic manner in most school districts.

The data analysis presented in this chapter and the four generalizations stated above represent an initial inquiry into the process of educational change. A major difficulty in ascertaining the degree of impact upon the change process of most of the hypotheses presented for review is the general lack of sophistication in the change implementation process demonstrated by most of the school districts in the sample.

The State Department of Education, charged with the monitoring and facilitation of the implementation process of Chapter 766, must assume some of the responsibility for the generally deficient change implementation. In enacting widespread legislation and the regulations to imple-

ent the law, the State Department gave the school districts the "rules" or regulations without the assistance they needed to facilitate the implementation process. The task of implementing Chapter 766 fell to each school district and the particular resources that they could bring to the task. Some of the fundamental elements necessary to develop implementation strategies that are effective were lacking in most of the school districts in the sample. These include:

1. Most school districts had not developed well defined needs assessment strategies.
2. Most school districts did not have a variety of change implementation strategies from which to choose.
3. Preparation time, from date of promulgation of the regulations to implement Chapter 766 (May, 1974) to the date of required implementation (September, 1974) was far too short for the development of change methods pertinent to each individual school district's needs.

Implications For Further Research

The research conducted in this study does point out several areas that may warrant further investigation. Initially, the question as to the "quality" of the implementation of Chapter 766 must be addressed. In the study conducted here, a very objective measure of the implementation of Chapter 766 was used, one that involved basic statistics regarding the number of CORE evaluations completed when compared to the number of referrals. This is seen as an indicator of the degree of implementa-

tion achieved and serves as a good measure for a study conducted at this point in time. However, in the future, a longitudinal study in which the effect of new programming efforts for special education students can be measured must be undertaken. The more statistical information regarding the numbers of children in programs or evaluated does not give an indication as to the impact those programs may have on the education of those students, or the quality of the change implementation. We have only measured the "amount" of implementation achieved in this study, and "amount" is not necessarily correlated with "quality."

With regard to the issue of "leadership" in educational change, and in particular, with regard to leading Chapter 766's implementation in each school district, this study did not account for the characteristics of the leaders and the influence that may have had on the adoption process. Further study might be conducted with this same sample to determine the leadership characteristics of those identified as having taken leadership roles in implementing Chapter 766 in the local districts. It may very well be that in those individual characteristics some relationship with the degree of implementation of educational change might be revealed.

To provide further insight into the change process regarding the implementation of Chapter 766, this study might be duplicated in other educational regions of the State of Massachusetts. It may result in a measure of the impact of the Regional Education Center's influence on the implementation of the law. This study cannot begin to determine to what degree the intervention and assistance of Regional Center Staffs across the State may have influenced school districts' achievement of Chapter 766 implementation.

The various hypotheses presented for evaluation in Chapter V warrant further investigation in additional studies of educational change adoption. The variables tested in this study might be demonstrated as influential change determinants in future studies of educational change, particularly those focused on the implementation or adoption phases of the change process.

In this research the surface has just been scratched regarding the implementation of educational change. The change studied here involves total school population change, and thus in this regard, may be somewhat of an unmanageable task. However, certain general finding regarding the sampled school districts bear further study and provide data for further research. The educational change process is indeed complex, and in the educational environment, many variables can produce or influence unaccountable results. Further studies in this area may help to reduce the impact of the myriad of variables so that a greater understanding of the process of implementation of educational change can result.

One of the most overriding implications that this study may serve to highlight is the lack of the diffusion of educational change theories and strategies to the grass roots school districts who are faced with the implementation of change. The researchers and theorists need to disseminate their information to the rank and file school district personnel if educational change is to occur with any facility. Very few of the school districts in the sample employed methods or strategies that demonstrated that they had the benefit of recent research in the educational change process. It would appear that educational researchers and the educational institutions that support them must begin to use their own

research results to diffuse their findings to those who are in a position to make use of the information. In all of the districts in the sample, administrative personnel were acknowledged as the leaders of educational change efforts, yet one would question the degree of involvement that most of the administrators in these districts might have had in change implementation methodology or research on diffusion strategies. To more fully assess this particular question, an in-depth study of the particular backgrounds and training of the administrators in each district correlated with the change strategies employed would be necessary.

The research conducted in this effort is valuable in that it points out the infancy of the research in educational innovation or change implementation. There is a significant degree of growth possible in this field, and hopefully, this study can point out some of the areas in which growth and evaluation is possible and necessary.

CHAPTER VI

SUMMARY AND CONCLUSIONS

The Study

The Massachusetts legislature passed an exciting and comprehensive law in 1972, Chapter 766, viewed as landmark special education reform. The law, implemented in 1974, removes all category labels pertaining to the handicapped and replaces these with the blanked designation "special needs." The law additionally calls for a comprehensive evaluation process for any child suspected of being in "need" of special education services and is committed to the philosophy of integration of handicapped within the mainstream of education to the fullest extent possible. The law mandates parental participation in the development of educational programs for their child, and grants parents' rights in determining their child's educational future. All of these features represent a departure from traditional special education practice in Massachusetts, and indeed in most states.

Beyond the dramatic and long overdue changes mandated by Chapter 766 with regard to special education, the law has, inherent in its implementation and philosophy, implications for the traditional or regular education program as well. The law presents a new conceptualization regarding variance in learner styles, in that wider ranges and varieties of learning abilities will now be represented in regular classrooms. Teachers are expected to demonstrate a new range of competencies under Chapter 766. They must be able to recognize learner needs, attempt to modify regular programs to meet those needs, and when this fails, refer the child for an evaluation. Additionally, teachers are major participants in the evaluation process,

providing information regarding the child's learning and behavioral strengths and weaknesses. Once the evaluation process has produced an educational plan, the teacher often then must actualize the plan in the classroom and provide periodic evaluations as to the appropriateness of the educational plan to the needs of the student.

The traditional school structure must make new adaptations to accommodate the requirements of Chapter 766. Schools must allow for teacher-administrator-specialist consultation on individual cases and in school-wide planning. The law, in the theoretical or philosophical sense, presents another change dimension for regular education in Massachusetts. Chapter 766 is a statement of significance regarding the availability of equal educational opportunity for all. In addition, the law implies that the most appropriate education is one based on diagnosed learner needs, and the development of learning strategies most appropriate to those needs. The legislation also postulates that participation in the "mainstream" of educational programs is a desirable goal for all youngsters, even those with "special needs." In essence, Chapter 766 proposes that education must adapt and flex to meet learner needs, rather than learners adapting to meet the requirements of the educational system.

Chapter 766 was mandated for implementation in September, 1974, a mandate which required each school district in the Commonwealth to practice the educational change that the law represents. This mandate provides an opportunity to examine and evaluate the change implementation process on a cross district basis, that is, through comparison of several school districts' implementation attempts. The research conducted in this study was completed "ex post facto," that is, after the initial year of implemen-

tation. The purpose was to gain some insight into the change implementation process and to attempt to isolate those variables which may have had an impact on the achievement of that implementation.

The Method

In order to evaluate the change implementation process with regard to Chapter 766, a series of hypotheses were authored and data collected for evaluation of the variables in question. The hypotheses were written in the "null" format and subjected to a chi-square analysis to ascertain the significance of relationships prescribed. The hypotheses are as follows:

1. There is no relationship between LEA enrollment and the degree of implementation of Chapter 766 achieved.
2. There is no relationship between the percentage of special needs population of the LEA and the degree of implementation achieved.
3. There is no relationship between the amount of money invested in special education by the LEA and the degree of implementation achieved.
4. There is no relationship between the amount of change required to implement Chapter 766 and the degree of implementation achieved.
5. There is no relationship between prior involvement with educational change or innovation and the degree of implementation achieved.
6. There is no relationship between LEA leadership patterns and the degree of implementation of Chapter

766 achieved.

7. There is no relationship between the effort invested to identify and utilize optimum methods to implement the Chapter 766 law and the degree of implementation of Chapter 766 achieved.
8. There is no relationship between the acquisition of needs assessment information and the degree of implementation of Chapter 766 achieved.
9. There is no relationship between the degree to which early adopters of educational change are utilized to influence laggards and the degree of implementation of Chapter 766 achieved.

To test the hypotheses stated above, the researcher selected all twenty-four school districts which comprise the Springfield Education Region of the State Department of Education. The school districts in this area are serviced by the same Bureau of Special Education staff and Regional Advisory Council and are, therefore, being evaluated by these monitoring agencies using common criteria.

Two basic data sources were used to compile the necessary information to test the hypotheses. Initially, the State Department of Education Monitoring Reports were used to collect basic demographic statistics. These reports provide school population data, special needs population data, 766 CORE Evaluation and referral statistics, special education budget data, and a variety of supporting data.

The second data source used in this study was a survey instrument developed to isolate a variety of variables with regard to the implemen-

tation of Chapter 766 in each school district. The instrument provided the following information: the prior status of special education programs in each school district, the extent of prior involvement with innovation or change of each district, the sources of leadership in the change effort, the amount of effort utilized to identify optimum methods for diffusing Chapter 766, the acquisition of needs assessment information in each district, and the extent to which early adopters were used to influence the laggards in each district with regard to the implementation of Chapter 766.

Data Results

In the chi-square analysis of each of the hypotheses, none of the nine were rejected. Statistically, the research failed to produce a significant validation of any of the variables' impact on the implementation of Chapter 766. In the chi-square analysis, the researcher chose the standard .05 level as the requirement for statistically rejecting the null hypothesis.

In the independent analysis, the data produced some interesting results. Hypothesis IV, regarding the degree of change required to implement Chapter 766, resulted in demonstrating that those districts which had the greatest distance to move to implement Chapter 766 generally were rated as "more fully implemented." The degree of implementation rating was based on the percentage of CORE Evaluations completed during the 1974-75 school year.

Hypothesis V, regarding prior involvement with education change, demonstrated that prior involvement with change practice gave little advantage to those school districts who had been previously involved with

innovation or change. In Hypothesis VI, regarding leadership, the data results demonstrated that change leadership was strongly a function of administrators in the data sample.

From the data collected, the following generalizations resulted:

1. Most school districts reported change leadership as a function of administration.
2. Expenditures on the targets of change efforts appear not to affect the implementation of that change.
3. Innovative and/or research based change implementation strategies are not generally practiced by school districts.
4. Needs assessment information is generally not collected in a well defined systematic manner in most school districts.

Conclusions

In conclusion, it would appear that the research served to point out the need for further research into the area of educational change, and in particular, the implementation phase of the change process. There was significant evidence in the data collected to indicate that those charged with the implementation of Chapter 766 did not have a wide background or knowledge in change implementation strategies. The law was implemented in a standard manner through a series of information workshops or in-service training in the mandates of the legislation.

The State Department of Education must also come to grips with its role as an educational change implementor. Their approach has been of

a regulatory and monitoring nature rather than facilitating and innovative. If State Departments of Education are to continue to act as change agents, they must begin to assess their capacity to facilitate the change implementation process.

Chapter 766 is, indeed, landmark legislation, and being mandated by state law, is a particular type of educational change. Chapter 766 does not allow for choice in its implementation. The definitions of educational programming that Chapter 766 requires may have met with undercurrents of resistance in various communities. In the sample, the impact of that subtle factor was not measured in the study. There may be, in fact, a difference in change implementation between those changes "mandated" and those that are freely chosen.

The school districts in the sample researched here must be commended in their implementation efforts. Although certain inadequacies are present in all districts, the degrees of implementation achieved by all of the districts represent a commitment to the philosophy and mandate of the law. Implementation of Chapter 766 is not easy. It represents new conceptual thinking with regard to special education, and involves the total professional staff of each school system. Such total change is difficult and, for each district to have achieved the levels of implementation recorded in this study, is a testament to intention and effort when one considers the lack of sophistication in change implementation that the data highlighted.

Chapter 766 deserves further study, especially longitudinal study regarding the impact of the law upon educational practice. Education is moving toward greater individualization, and Chapter 766 is a significant

step in the direction of educational programming to meet learner needs, rather than forcing the learner to meet the demands of education.

The study conducted here is an initial investigation into educational change implementation, one that hopefully will encourage replication and new educational research.

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